EXHIBIT 16

Message

From: Marta Martinez [martinezmarta@google.com]
Sent: 12/14/2018 8:48:51 PM
To: APMG [ap-mg@google.com]
Subject: Fwd: [Amg] Fwd: Google Q4 Synthesis Report follow up
Attachments: Google Q4 Synthesis Final.pptx

Team,

Attached below is the AdPerceptions Competitive analysis that I mentioned during our meeting. What stands up for me is:

- Tube's scores are going up compared to TV centric players (pag 12 -14)
- Google Display Network scores as a "Must Buy" (pag 20)
- Amazon and Google Display Network score when it comes to "Value for Money" (pag 24)
- Amazon taking on A LOT of ground, trending as the most preferred DSP (pag 41)
- TTD perception continues to grow consistently since 2016 (pag 41)

Good input to inform our strategies and narratives.

Marta

---------- Forwarded message ---------
From: **Ryan Vauk** <ryanvauk@google.com>
Date: Fri, Dec 7, 2018 at 8:52 PM
Subject: [Amg] Fwd: Google Q4 Synthesis Report follow up
To: amg <amg@google.com>
CC: Carlos Araujo <carlosa@google.com>, Chris Pollak <cpollak@google.com>

AMG: Attached below is the data pack Advertiser Perceptions shared with us on Tuesday.
Feel free to let Chris or me know if you have any feedback, or have additional questions you'd like them to address.

---------- Forwarded message ---------
From: **Dave Steinberger** <dave.steinberger@advertiserperceptions.com>
Date: Fri, Dec 7, 2018 at 11:38 AM
Subject: Google Q4 Synthesis Report follow up
To: Ryan Vauk <ryanvauk@google.com>
Cc: Allan Thygesen <allant@google.com>, Carlos Araujo <carlosa@google.com>, Kevin Mannion <kevin.mannion@advertiserperceptions.com>, Randy Cohen <randy.cohen@advertiserperceptions.com>, Barbara Leung <barbara.leung@advertiserperceptions.com>

Hi Ryan,

During the good discussion that accompanied Kevin's presentation of our synthesized analysis, there were several key topics that surfaced:

- Competitive factors, including Facebook's challenges, Amazon's rapid progress as a 'must buy', The Trade Desk's momentum with marketers and Pandora's rise as digital audio enters the home.
- Delve into vertical analyses to better understand specific sectors of strength and challenges for Google, Amazon and the competitive set.
- Broadly study how advertisers are funding their Amazon spend – whether it's with the DSP, Search-like offerings on the commerce platform, or otherwise. It's still early but the directional findings are worthy of attention.
- Explore scaled communication initiatives to improve coverage with advertisers and marketers

The full deck we presented on Tuesday is attached. As follow up, we will look into the DSP ratings broken out by Amazon's endemic and non-endemic verticals. We will also work with Chris on the upcoming Omnibus questions and will look to arrange time with Sean Downey to share the results from the latest DSP research. Please let us know if there are any additional action items that have surfaced from the meeting.

Best,
Dave

--
Dave Steinberger
Vice President, Client Solutions
Advertiser Perceptions

ph: 415-819-6071
e: Dave.Steinberger@AdvertiserPerceptions.com

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- **Ryan Vauk**
- **Director, Americas GTM Operations**
  ryanvauk@google.com
  973.342.4035
- ABP: lstegman@google.com

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Tara Walpert Levy | Vice President, Google | taralevy@google.com | 9176968191

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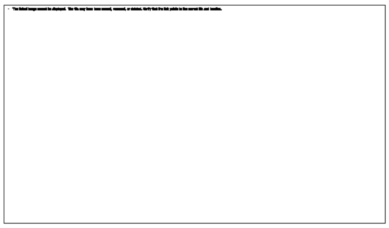
Marta Martinez | Director, Agency Platforms | martinezmarta@google.com | Google LLC



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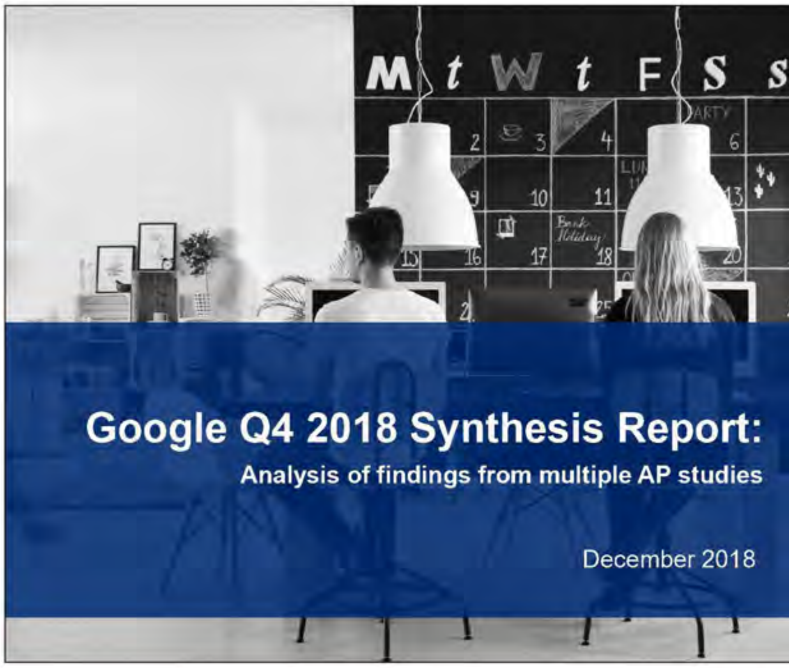
To post to this group, send email to ap-mg@google.com.
To view this discussion on the web visit https://groups.google.com/a/google.com/d/msgid/ap-mg/CAPJ0LA-%2BgcvLEBMFBG%2BM9sQ6NgbXb_-VZrOGU-GVw06uuznpDQ%40mail.gmail.com.



Google Q4 2018 Synthesis Report:

Analysis of findings from multiple AP studies

December 2018

Advertiser Perceptions

What Advertisers Think™

The More You Know
The Stronger Your Brand
The More You'll Sell™

Today's Discussion

- General market perspective: spending optimism by media type
- TV & digital video advertiser perspective of UpFronts/NewFronts
- Advertiser perspective on digital media brands
  - Search advertiser perspective of Amazon
- Programmatic: demand and sell-side perspectives
- Advertiser perspective of trust & privacy
- Personal vs professional advertiser perspectives of FB and lead brands
  - Touching on post-CA impact

Advertiser Perceptions

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Advertiser Perceptions by the numbers

16	65	85	300
YEARS	STUDIES	CLIENTS	PRESENTATIONS
of proprietary, historical data about "what advertisers think"	conducted per year: syndicated & custom, quantitative & qualitative, U.S. & Global	ranging from traditional media to emerging ad tech	delivered per year, sparking active dialogues about key issues in the marketplace

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Sources* for reports informing our Google analysis

1. **Advertiser Intelligence Reports**
   - Fielded biannually, primary focus here: July 2018
   - 2000+ mid-level to large advertisers (agency/marketer)
2. **Upfront/Newfront Season Impact Report**
   - Fielded annually directly following Upfront/Newfront presentations, focus here: May/June 2018
   - 425 advertisers & marketers involved in spending decisions for TV/digital/mobile video
3. **Programmatic Intelligence Reports (DSP & SSP)**
   - Fielded biannually, primary focus here: July and August 2018
   - DSP Report: 400+ mid-level to large advertisers (agency/marketer)
   - SSP Report: 150+ publisher sales and operations professionals
4. **Omnibus**
   - Fielded every other month
   - ~300 mid-level to large advertisers (agency/marketer)

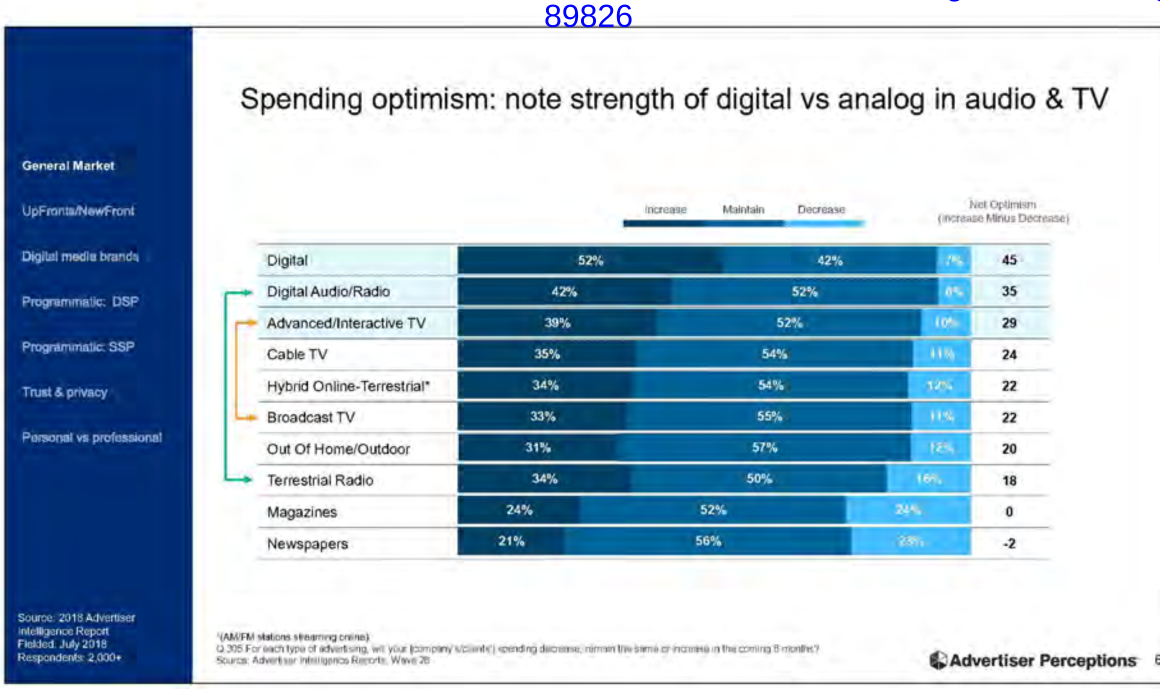
*US-only

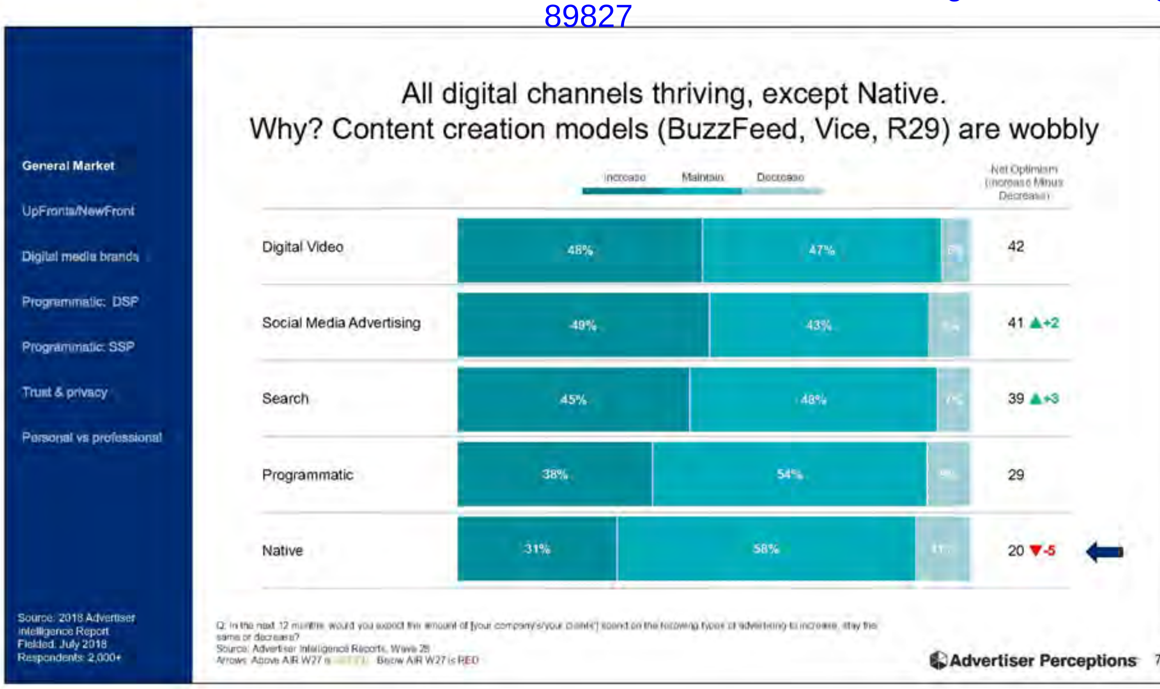
Advertiser Perceptions 4

General Market Perspective

- Spending favors all things digital – especially contrasted with analog counterparts
- Within the digital galaxy, native publishing is on a wobbly path

Advertiser Perceptions


Spending optimism: note strength of digital vs analog in audio & TV
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Increase
Maintain
Decrease
Net Optimism (Increase Minus Decrease)
Digital 52% 42% 7% 45
Digital Audio/Radio 42% 52% 6% 35
Advanced/Interactive TV 39% 52% 10% 29
Cable TV 35% 54% 11% 24
Hybrid Online-Terrestrial* 34% 54% 12% 22
Broadcast TV 33% 55% 11% 22
Out Of Home/Outdoor 31% 57% 12% 20
Terrestrial Radio 34% 50% 16% 18
Magazines 24% 52% 24% 0
Newspapers 21% 56% 23% -2
Source: 2018 Advertiser Intelligence Report
Fielded: July 2018
Respondents: 2,000+
*(AM/FM stations streaming online)
Q.305 For each type of advertising, will your [company's/clients'] spending decrease, remain the same or increase in the coming 6 months?
Source: Advertiser Intelligence Reports, Wave 26
Advertiser Perceptions
6


All digital channels thriving, except Native.
Why? Content creation models (BuzzFeed, Vice, R29) are wobbly
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Increase
Maintain
Decrease
Net Optimism (Increase Minus Decrease)
Digital Video
48%
47%
42
Social Media Advertising
49%
43%
41 +2
Search
45%
48%
39 +3
Programmatic
38%
54%
29
Native
31%
58%
20 -5
Source: 2018 Advertiser Intelligence Report
Fielded: July 2018
Respondents: 2,000+
Source: Advertiser Intelligence Reports, Wave 28
Advertiser Perceptions
7

TV & digital video advertiser perspective of UpFronts/NewFronts

- YouTube rated the most impactful NewFront or Upfront presentation. Period.
- And rated at or near the top of each category mattering most to attendees
- Most relevant: YouTube among the top brands in convincing advertisers to spend more

Advertiser Perceptions

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

2018 Attendance: YouTube tied with CBS, Hulu for 2nd

Top 20 Upfront/NewFront Presentations Attended
Percent of Total Respondents

1	NBCUniversal	41%	11	viacom	25%
2	CBS	38%	12	CW	24%
3	hulu	38%	13	Turner	23%
4	**Google YouTube**	**38%**	14	Discovery scripps	22%
5	FOX	36%	15	ESPN FIRST	20%
6	ESPN	33%	16	univision	19%
7		31%	17	AMC NETWORKS	18%
8	Disney abc Television Group	31%	18	BBC	18%
9	The New York Times	29%	19	Condé Nast	17%
10	meredith	26%	20	VICE	17%

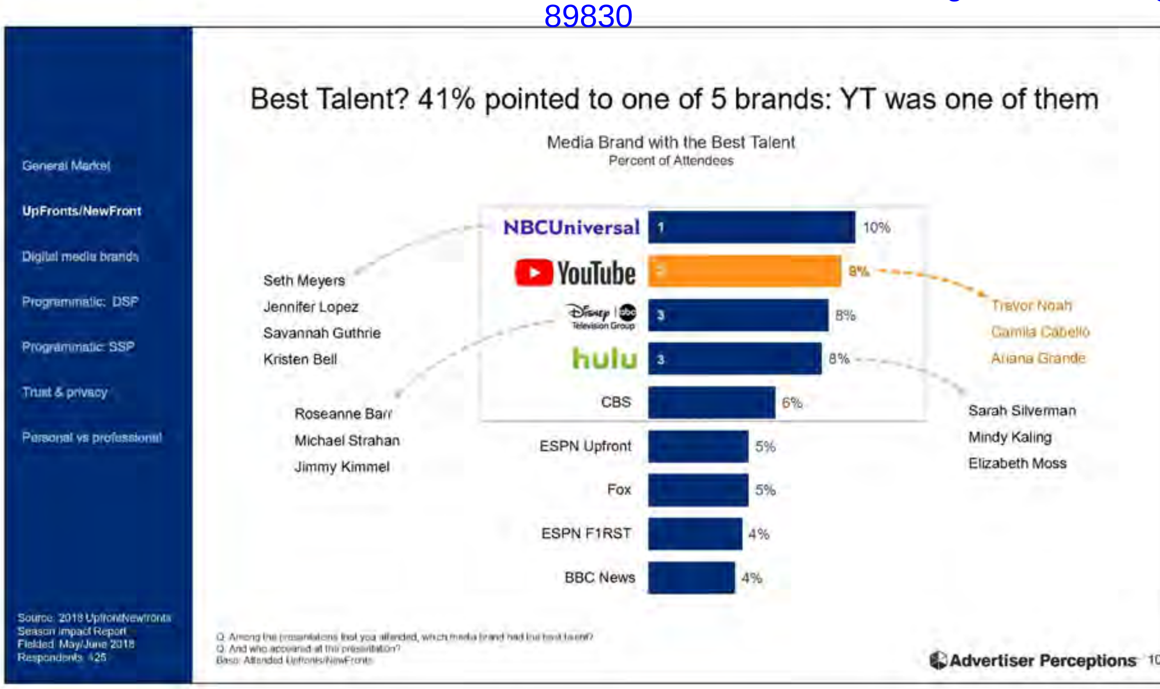
8
Average number of 2018 Upfront/NewFront events attended

Source: 2018 Upfront/Newfronts Season Impact Report
Fielded: May/June 2018
Respondents: 425

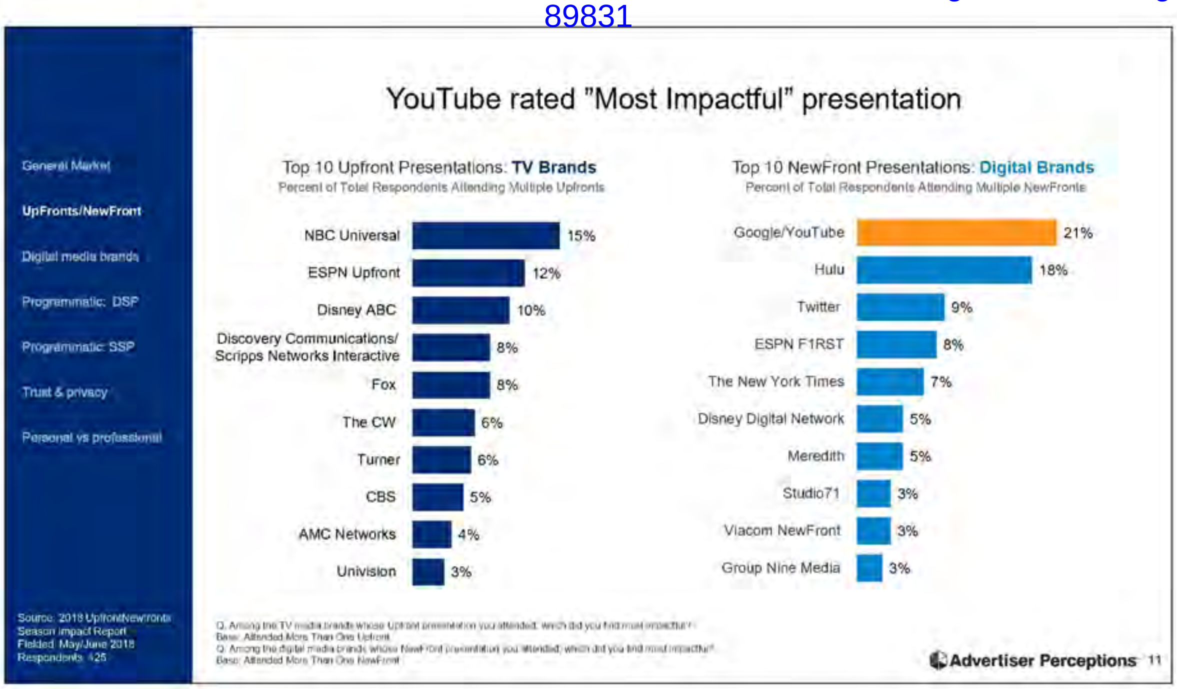
Q: Please indicate which of these Upfront and/or NewFront presentations you attended for the 2018 season. By attended we mean live in-person OR via simulcast. Base: Attended Upfronts/NewFronts **See Appendix for Full Listing of Event Attendance**
Q: How likely will you be to attend next year's (2019) Upfront or Digital NewFronts event? Base: Total Respondents

Advertiser Perceptions

Q1, Q30


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Source: 2018 Upfront/Newfronts Season Impact Report
Fielded: May/June 2018
Respondents: 425
Best Talent? 41% pointed to one of 5 brands: YT was one of them
Media Brand with the Best Talent
Percent of Attendees
NBCUniversal 1 10%
YouTube 2 8%
Disney | abc Television Group 3 8%
hulu 3 8%
CBS 6%
ESPN Upfront 5%
Fox 5%
ESPN F1RST 4%
BBC News 4%
Seth Meyers
Jennifer Lopez
Savannah Guthrie
Kristen Bell
Roseanne Barr
Michael Strahan
Jimmy Kimmel
Trevor Noah
Camila Cabello
Ariana Grande
Sarah Silverman
Mindy Kaling
Elizabeth Moss
Q: Among the presentations that you attended, which media brand had the best talent?
Q: And who appeared at this presentation?
Base: Attended Upfronts/NewFronts
Advertiser Perceptions 10

Q16a1, Q16a2



YouTube rated "Most Impactful" presentation
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Top 10 Upfront Presentations: TV Brands
Percent of Total Respondents Attending Multiple Upfronts
NBC Universal 15%
ESPN Upfront 12%
Disney ABC 10%
Discovery Communications/ Scripps Networks Interactive 8%
Fox 8%
The CW 6%
Turner 6%
CBS 5%
AMC Networks 4%
Univision 3%
Top 10 NewFront Presentations: Digital Brands
Percent of Total Respondents Attending Multiple NewFronts
Google/YouTube 21%
Hulu 18%
Twitter 9%
ESPN F1RST 8%
The New York Times 7%
Disney Digital Network 5%
Meredith 5%
Studio71 3%
Viacom NewFront 3%
Group Nine Media 3%
Source: 2018 Upfront/Newfronts Season Impact Report
Fielded: May/June 2018
Respondents: 425
Q. Among the TV media brands whose Upfront presentation you attended, which did you find most impactful?
Base: Attended More Than One Upfront
Q. Among the digital media brands whose NewFront presentation you attended, which did you find most impactful?
Base: Attended More Than One NewFront
Advertiser Perceptions 11

Q3b1/Q3c1

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

In their own words: TV-quality programming, uniquely valuable, polished presentation

Google YouTube

*Google/YouTube **is reinventing itself with a huge shift from mobile screens to TV screens featuring high quality, premium content**. This is a huge breakthrough that the other brands are not able to do yet.*
- Agency Consultant

*What they offered at that presentation was **very modern and different from other presentations** delivered during the conference.*
- Advertiser, VP

*Had the **best overall analysis & speakers that showed why they are the best** at what they do.*
- Advertiser, Director

*The presentation was **informative, easy to follow,** and contained an **abundance of useful information**.*
- Agency, Supervisor

Source: 2018 Upfront/Newfronts Season Impact Report
Fielded: May/June 2018
Respondents: 425

Q: What was the best thing they did that others did not do or did not do as well?
Base: Most Impactful Upfront Presentation

Advertiser Perceptions 12

Q3c2

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Highest Rated: A few brands top each of **6 categories**. YT is among them

Percent Rating Media Brands 8-10 on a 10-Point Scale

Appropriately Addressed Questions Surrounding Ad Placement	
Google YouTube	71%
Univision	70%
CW	65%
Disney ABC Television Group	61%
AMC Networks	59%
ESPN	58%
Discovery Communications	57%
National Geographic	54%
CBS	53%
NBCUniversal	51%
A+E	49%
Turner	48%
FOX	35%

Innovative and Fresh	
Google YouTube	71%
National Geographic	69%
Univision	65%
AMC Networks	64%
Discovery Communications	61%
CW	58%
ESPN	57%
A+E	54%
CBS	53%
Turner	50%
Disney ABC Television Group	49%
NBCUniversal	48%
FOX	40%

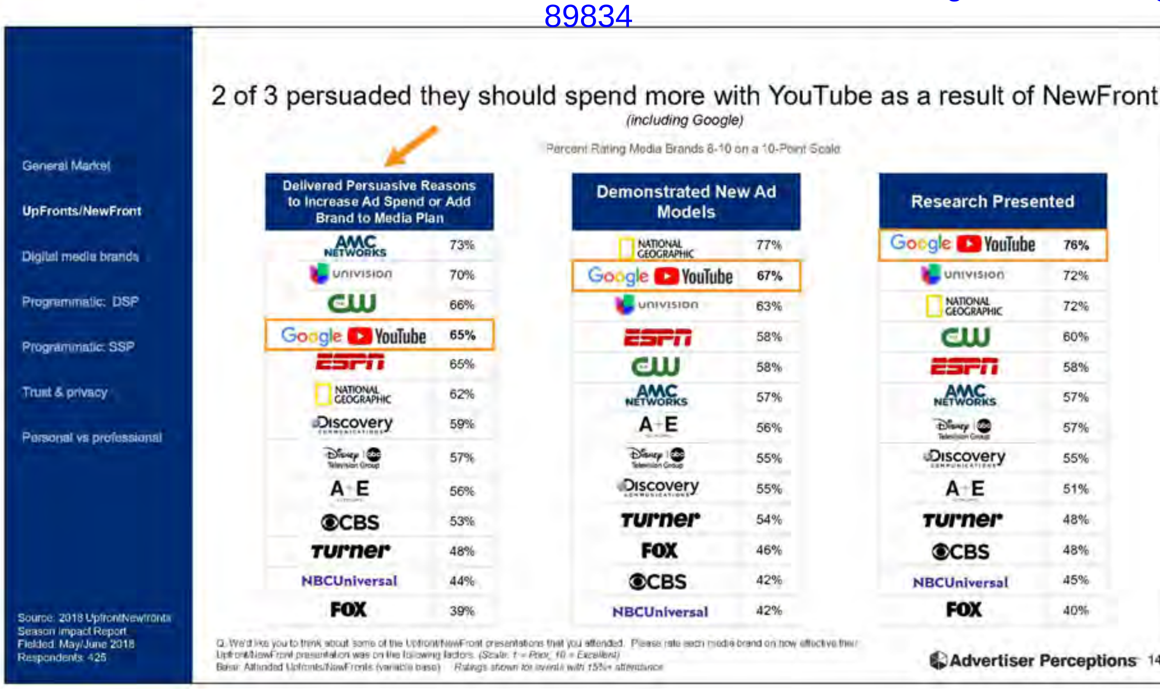
Clarity of Message and Call to Action	
Univision	70%
Google YouTube	68%
Discovery Communications	65%
AMC Networks	64%
National Geographic	62%
CW	61%
Disney ABC Television Group	57%
A+E	56%
ESPN	55%
CBS	55%
NBCUniversal	51%
Turner	46%
FOX	38%

Source: 2018 Upfront/Newfronts Season Impact Report
Fielded: May/June 2018
Respondents: 425

Q. We'd like you to think about some of the Upfront/NewFront presentations that you attended. Please rate each media brand on how effective their Upfront/NewFront presentation was on the following factors. *(Scale: 1 = Poor; 10 = Excellent)*
Base: Attended Upfronts/NewFronts (variable base) *Ratings shown for events with 150+ attendance*

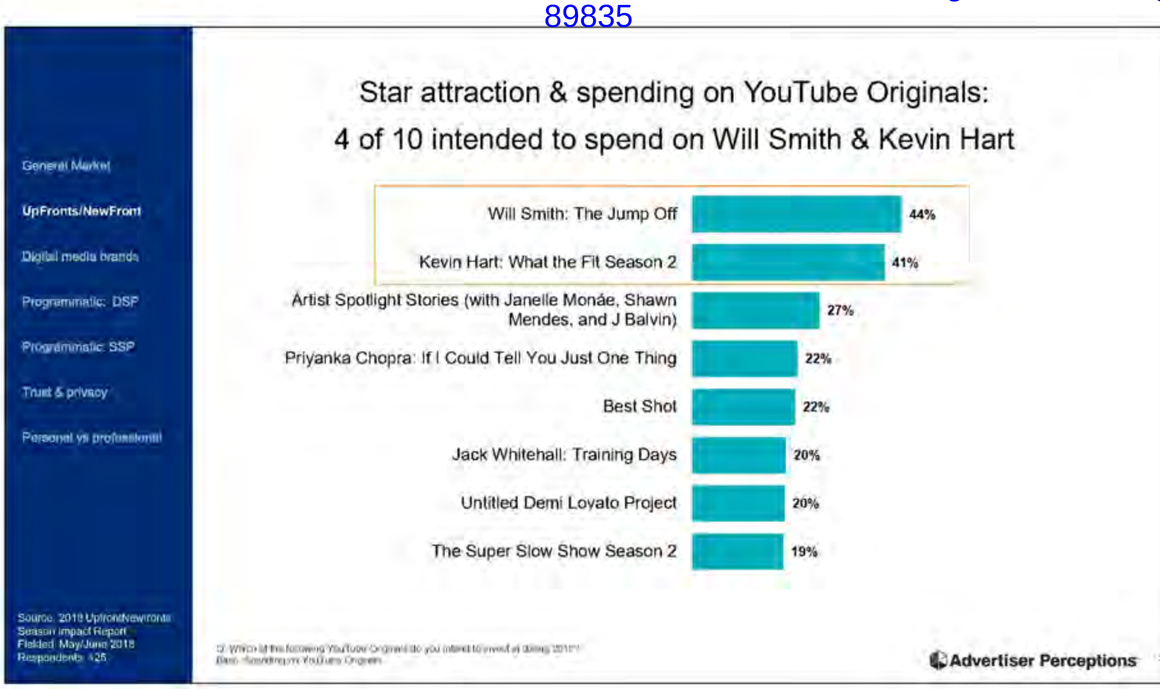
Advertiser Perceptions 13

Q8



General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Source: 2018 Upfront/Newfronts Season Impact Report
Fielded: May/June 2018
Respondents: 425
2 of 3 persuaded they should spend more with YouTube as a result of NewFront
(including Google)
Percent Rating Media Brands 8-10 on a 10-Point Scale
Delivered Persuasive Reasons to Increase Ad Spend or Add Brand to Media Plan
AMC Networks 73%
Univision 70%
CW 66%
Google YouTube 65%
ESPN 65%
National Geographic 62%
Discovery 59%
Disney ABC Television Group 57%
A+E 56%
CBS 53%
Turner 48%
NBCUniversal 44%
FOX 39%
Demonstrated New Ad Models
National Geographic 77%
Google YouTube 67%
Univision 63%
ESPN 58%
CW 58%
AMC Networks 57%
A+E 56%
Disney ABC Television Group 55%
Discovery 55%
Turner 54%
FOX 46%
CBS 42%
NBCUniversal 42%
Research Presented
Google YouTube 76%
Univision 72%
National Geographic 72%
CW 60%
ESPN 58%
AMC Networks 57%
Disney ABC Television Group 57%
Discovery 55%
A+E 51%
Turner 48%
CBS 48%
NBCUniversal 45%
FOX 40%
Q. We'd like you to think about some of the Upfront/NewFront presentations that you attended. Please rate each media brand on how effective their Upfront/NewFront presentation was on the following factors. (Scale: 1 = Poor, 10 = Excellent)
Base: Attended Upfronts/NewFronts (variable base) Ratings shown for events with 15%+ attendance
Advertiser Perceptions 14

Q8


Star attraction & spending on YouTube Originals:
4 of 10 intended to spend on Will Smith & Kevin Hart
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Will Smith: The Jump Off 44%
Kevin Hart: What the Fit Season 2 41%
Artist Spotlight Stories (with Janelle Monáe, Shawn Mendes, and J Balvin) 27%
Priyanka Chopra: If I Could Tell You Just One Thing 22%
Best Shot 22%
Jack Whitehall: Training Days 20%
Untitled Demi Lovato Project 20%
The Super Slow Show Season 2 19%
Source: 2018 Upfront/Newfronts Season Impact Report
Fielded: May/June 2018
Respondents: 425
Advertiser Perceptions

QYT4

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Advertiser Perspective on Digital Media Brands

- FB is less solid, Instagram is a safe harbor: Post-CA impact?
- "Audience story" perceptions favored FB: Google, Amazon surge ahead
- Amazon: gaining as must buy . . .
  - . . .and appear to be taking dollars allocated to Google Ads
- Should Pandora be on Google's radar screen as a rising competitor?
  - Solid in all the right places—except as "Must Buy"
  - Will Pandora soar as Google, Apple, Amazon digital assistants rocket?
  - And of course Pandora now has Sirius backing

Advertiser Perceptions

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

Leaders in consideration

Percent Considering (8-10)

1	Facebook	61%
2	Oath O&O (Net)	60%
3	Google Search	56%
4	Google Display Network	51%
5	YouTube	50%
6	Twitter	45%
7	Instagram	44%
8	Pandora	40%
9	Bing	36%
10	Facebook Messenger	35%
11	Yahoo! Search	34%
12	Microsoft Display	34%
13	Snapchat	34%
14	ABC	34%
15	LinkedIn	34%
16	ESPN	34%
17	Hulu	33%
18	Pinterest	32%
19	WhatsApp	31%
20	Amazon	30%

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Q: Would you consider advertising with [brand] in the next six months. (Definitely Would Consider, Might Consider, Definitely Would Not Consider)
Base: Total Digital Respondents
*Sig. Difference = +/- 5 percentage points

Advertiser Perceptions 17

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

For our analysis today, we will focus on Google, FB, Amazon, Twitter, Snap, Bing…

Percent Considering (8-10)

1	Facebook	61%
2	Oath O&O (Net)	60%
3	Google Search	56%
4	Google Display Network	51%
5	YouTube	50%
6	Twitter	45%
7	Instagram	44%
8	*	40%
9	Bing	36%
10	Facebook Messenger	35%
11		34%
12		34%
13	Snapchat	34%
14		34%
15		34%
16		34%
17		33%
18		32%
19		31%
20	Amazon	30%

*More on Pandora, later

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Q: Would you consider advertising with [brand] in the next six months. (Definitely Would Consider, Might Consider, Definitely Would Not Consider)
Base: Total Digital Respondents
*Sig. Difference = +/- 5 percentage points

Advertiser Perceptions 18

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

No media brand has higher **intention** levels than FB

Percent Intending (8-10)

1	Facebook	54%
2	Oath O&O	48%
3	Google Search Ads	48%
4	Google Display Network	43%
5	YouTube	40%
6	Twitter	37%
7	Instagram	35%
8	Bing	28%
9	Snapchat	26%
10	Amazon	25%

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Q: How likely are you to advertise with each media property in the coming six months? (Will Not Advertise, Might Advertise, Will Advertise)
Base: Total Digital Respondents
*Sig. Difference = +/- 5 percentage points

Advertiser Perceptions 19

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Must-buy (subset of buying intention): FB & Google in dominant positions

Prioritization of digital brands among those indicating they might/definitely would advertise with them in the coming six months

1	Facebook	59%
2	Google Search Ads	58%
3	Google Display Network	56%
4	YouTube	49%
5	Twitter	41%
6	Instagram	39%
7	Amazon	35%
8	Bing	28%
9	Oath O&O	27%
9	Snapchat	27%

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

QX18a: Below is a short list of some of the brands you said you might or definitely would advertise with in the coming six months. Please sort them into the most appropriate group. Base: Might/Definitely Would Advertise
*Sig. Difference = +/- 5 percentage points

Advertiser Perceptions 20

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

FB, Amazon and Google have highest recommendation levels

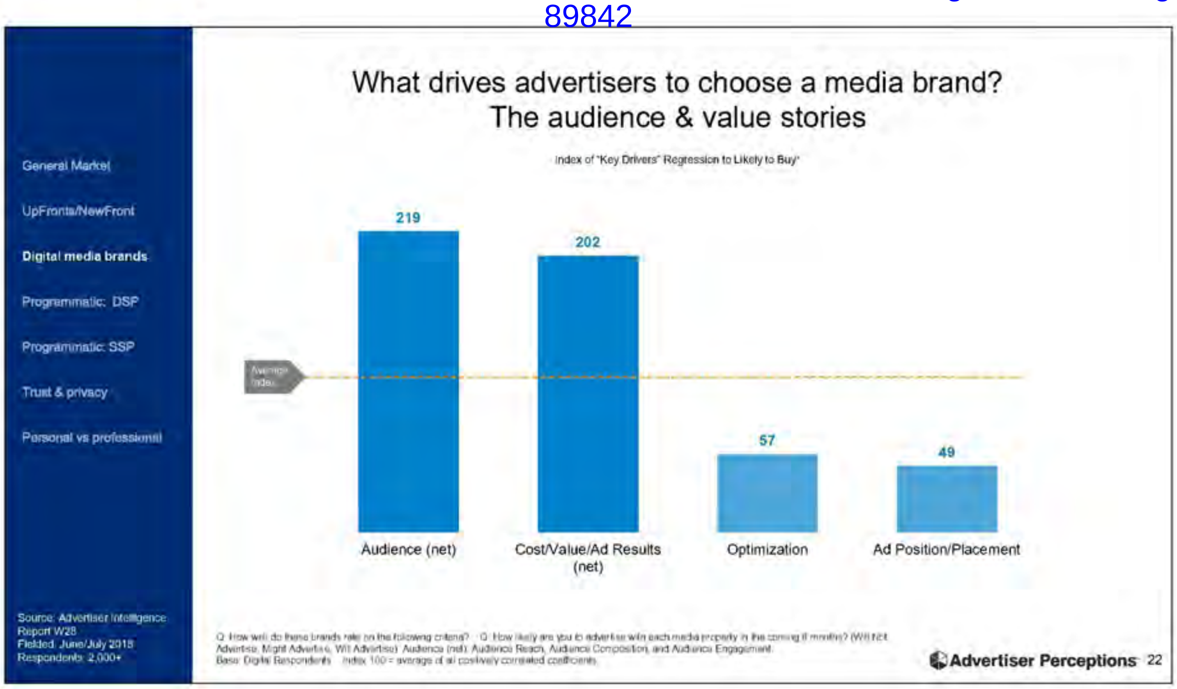
Percent Rating Media Brands 8-10 on 10-Point Scale

			Sig. Difference* from W27
1	Google Search Ads	74%	
2	Facebook	72%	
2	Amazon	69%	
4	Google Display Network	68%	
5	Instagram	66%	
6	YouTube	64%	
7	Twitter	59%	
8	Bing	55%	▼-8
9	Oath O&O (Net/Avg)	51%	
10	Snapchat	49%	

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Q: Based on your most recent advertising experience, how likely are you to recommend each media brand to a colleague?
Base: Current/Past Advertisers (Facebook: 186, Facebook Messenger: 190; Instagram: 180)
*Sig. Difference = +/- 5 percentage points

Advertiser Perceptions 21



What drives advertisers to choose a media brand?
The audience & value stories
Index of "Key Drivers" Regression to Likely to Buy*
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
219
202
57
49
Audience (net)
Cost/Value/Ad Results (net)
Optimization
Ad Position/Placement
Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+
Advertiser Perceptions
22

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

YT, Amazon, GDN surge past FB in composition, similar story in reach. Amazon gains across the board

Percent Rating Media Brands 8-10 on a 10-Point Scale

Audience (net)		Audience Composition		Audience Reach		Audience Engagement	
YouTube	50% ▲+7	YouTube	54% ▲+10	Amazon	56% ▲+7	YouTube	45%
Amazon	49% ▲+6	Amazon	51% ▲+7	Google Display Network	53% ▲+5	Instagram	43%
Facebook	46%	Google Display Network	50% ▲+6	Facebook	49%	Twitter	42%
Google Display Network	46%	Facebook	49%	YouTube	49% ▲+7	Facebook	41%
Twitter	44% ▲	Twitter	46% ▲+7	Twitter	43%	Amazon	40% ▲+5
Instagram	40% ▲	Instagram	39%	Instagram	37% ▲+6	Snapchat	37%
Snapchat	37%	Snapchat	38%	Snapchat	37%	Google Display Network	37%
Oath O&O	35%	Oath O&O	33%	Oath O&O	35%	Oath O&O	35%

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Q: How well do these brands rate on the following criteria? Audience (net): Audience Reach, Audience Composition, and Audience Engagement
Base: Digital Respondents Considering Media Brand
Arrows: Above AIR W26 by 5+ points is GREEN; Below AIR W26 by 5+ points is RED

Advertiser Perceptions 23

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Value Story is stable, but AMZN, GDN have caught YT & FB in "Value for Money"

Percent Rating Media Brands 8-10 on a 10-Point Scale

Value (net)		Cost/Price		Value for Money		Ad Results	
Google Display Network	42%	YouTube	40%	Amazon	41% ▲+5	Google Display Network	49%
YouTube	40%	Facebook	39%	Google Display Network	40% ▲+5	Amazon	41%
Facebook	39%	Google Display Network	39%	YouTube	40%	YouTube	40%
Amazon	38%	Twitter	36%	Facebook	39%	Facebook	40%
Twitter	35%	Instagram	35%	Twitter	34%	Twitter	36%
Oath O&O	34%	Oath O&O	35%	Instagram	33%	Oath O&O	33%
Instagram	33%	Amazon	33%	Oath O&O	33%	Instagram	30% ▲+5
Snapchat	29%	Snapchat	27%	Snapchat	28%	Snapchat	30%

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Q: How well do these brands rate on the following criteria? Audience (net): Audience Reach, Audience Composition, and Audience Engagement
Base: Digital Respondents Considering Media Brand
Arrows: Above AIR W26 by 5+ points is GREEN; Below AIR W26 by 5+ points is RED

Advertiser Perceptions 24

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

The AIR Score: Metric synthesizing critical buying & perception data

1. Buying intention
2. Must buy
3. Must buy & increasing spend
4. Must buy & decreasing spend
5. Audience Story
6. Value Story

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Advertiser Perceptions 25

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Google and FB brands dominate top 5 positions in total AIR Score

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
1	Google Search Ads							.522
2	**Facebook**							.474
3	Google Display Network							.454
4	YouTube							.452
6	**Instagram**							.387
5	Twitter							.390
7	**Amazon**							.381
8	Hulu							.353
9	**Facebook Messenger**							.344
10	ESPN							.325
11	Oath O&O							.324
12	Pandora							.322
13	Bing							.311
14	LinkedIn							.309
15	Snapchat							.294
16	Pinterest							.290
17	Microsoft Display							.279
18	Yahoo! Search							.274
	TOTAL POSSIBLE SCORE							1.000

*Search: vol of conversions **Search: ROI

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Advertiser Perceptions 26

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Facebook, Google and Oath lead in share of advertisers with intention to spend

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
2	**Facebook**	108						
1	Google Search Ads	96						
11	Oath O&O	96						
3	Google Display Network	86						
4	YouTube	80						
5	Twitter	74						
6	**Instagram**	70						
12	Pandora	58						
10	ESPN	56						
13	Bing	56						
9	**Facebook Messenger**	54						
14	LinkedIn	54						
17	Microsoft Display	54						
18	Yahoo! Search	54						
15	Snapchat	52						
16	Pinterest	52						
7	**Amazon**	50						
8	Hulu	50						
	TOTAL POSSIBLE SCORE	200						

BI, Buying intention:
Likelihood to spend with brand
Metric based on percentage "very likely" to spend, multiplied by 2

*Search: vol of conversions **Search: ROI Q: How likely are you to advertise with each media property in the coming six months? (Will Not Advertise, Might Advertise, Will Advertise) Base: Total Digital Respondents

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Advertiser Perceptions 27

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

FB, Google Search, Google Display, YouTube are the "must buy" leaders

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
2	**Facebook**	108	118					
1	**Google Search Ads**	96	116					
3	**Google Display Network**	86	112					
4	**YouTube**	80	98					
5	Twitter	74	82					
6	**Instagram**	70	78					
10	ESPN	56	72					
7	**Amazon**	50	70					
14	LinkedIn	54	60					
18	Yahoo! Search	54	60					
16	Pinterest	52	58					
8	Hulu	50	58					
12	Pandora	58	56					
13	Bing	56	56					
9	**Facebook Messenger**	54	56					
11	Oath O&O	96	54					
15	Snapchat	52	54					
17	Microsoft Display	54	44					
	TOTAL POSSIBLE SCORE	200	200					

Must Buy:
Percentage of intenders who view the brand as a must buy

Metric based on percentage of must buyers multiplied by 2

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

*Search: vol of conversions **Search: ROI Q: Below is a short list of some of the brands you said you might or definitely would advertise with in the coming six months. Please sort them into the most appropriate group. Base: Might/Definitely Would Advertise

Advertiser Perceptions 28

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Instagram & Amazon emerging among must-buy spending increasers
Note Facebook

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
4	YouTube	80	98	102				
6	**Instagram**	70	78	100				
7	**Amazon**	50	70	98				
1	Google Search Ads	96	116	92				
8	Hulu	50	58	90				
2	**Facebook**	108	118	88				
3	Google Display Network	86	112	88				
5	Twitter	74	82	86				
15	Snapchat	52	54	82				
9	**Facebook Messenger**	54	56	80				
14	LinkedIn	54	60	76				
10	ESPN	56	72	74				
11	Oath O&O	96	54	66				
13	Bing	56	56	64				
16	Pinterest	52	58	62				
17	Microsoft Display	54	44	62				
12	Pandora	58	56	54				
18	Yahoo! Search	54	60	52				
	TOTAL POSSIBLE SCORE	200	200	200				

Must Buy, Increasing Spend:
Percentage of must buyers who say they are increasing their spend

Metric based on percentage, multiplied by 2

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

*Search: vol of conversions **Search: ROI Q: Below are the media brands you said are "Must Buy/First Tier." Please sort them into the most appropriate group (Increasing Spend, Maintaining Spend, Decreasing Spend) Base: Ranked brand as 'Must Buy'

Advertiser Perceptions 29

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Oath was a leader in BI, but note the must-buyers who are decreasing

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
6	**Instagram**	70	78	100	-8			
7	**Amazon**	50	70	98	-8			
13	Bing	56	56	64	-8			
4	YouTube	80	98	102	-10			
1	**Google Search Ads**	96	116	92	-10			
3	**Google Display Network**	86	112	88	-10			
8	Hulu	50	58	90	-12			
5	Twitter	74	82	86	-14			
2	**Facebook**	108	118	88	-16			
18	Yahoo! Search	54	Doubled in 6 months		-16			
9	**Facebook Messenger**	54	56	80	-22			
16	Pinterest	52	58	62	-22			
15	Snapchat	52	54	82	-24			
17	Microsoft Display	54	44	62	-24			
12	Pandora	58	56	54	-24			
14	LinkedIn	54	60	76	-26			
11	Oath O&O	96	54	66	-28			
10	ESPN	56	72	74	-30			
	TOTAL POSSIBLE SCORE	200	200	200	0 (-200)			

Must Buy, Decreasing Spend:
Percentage of must buyers who say they are decreasing their spend, shown as a negative number

Metric based on percentage, multiplied by 2

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

*Search vol of conversions **Search ROI Q: Below are the media brands you said are "Must Buy/First Tier." Please sort them into the most appropriate group (Increasing Spend, Maintaining Spend, Decreasing Spend) Base: Ranked item as "Must Buy"

Advertiser Perceptions 30

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Audience story favors Google Search. A strength for Pandora, YT, Hulu and Amazon

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
1	Google Search Ads	96	116	92	-10	117		
12	Pandora	58	56	54	-24	88		
9	**Facebook Messenger**	54	56	80	-22	87		
4	YouTube	80	98	102	-10	85		
8	Hulu	50	58	90	-12	85		
7	**Amazon**	50	70	98	-8	83		
3	Google Display Network	86	112	88	-10	78		
2	**Facebook**	108	118	88	-16	78		
14	LinkedIn	54	60	76	-26	77		
5	Twitter	74	82	86	-14	75		
10	ESPN	56	72	74	-30	75		
17	Microsoft Display	54	44	62	-24	73		
16	Pinterest	52	58	62	-22	70		
6	Instagram	70	78	100	-8	68		
15	Snapchat	52	54	82	-24	63		
13	Bing	56	56	64	-8	60		
11	Oath O&O	96	54	66	-28	60		
18	Yahoo! Search	54	60	52	-16	51		
	TOTAL POSSIBLE SCORE	200	200	200	0 (-200)	170		

Audience (Net):

Composed of:
- Audience Engagement
- Audience Reach
- Audience Composition

Search brands make use of Volume of Conversions

Metric based on percentage, multiplied by 1.7

*Search: vol of conversions **Search: ROI Q: How well do these brands rate on the following criteria? Audience (net): Audience Reach, Audience Composition, and Audience Engagement

Advertiser Perceptions 31

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

The Value Story: 3 Google brands among top 5 media brands

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
1	Google Search Ads	96	116	92	-10	117	59	
12	Pandora	58	56	54	-24	88	57	
9	**Facebook Messenger**	54	56	80	-22	87	55	
3	Google Display Network	86	112	88	-10	78	55	
4	YouTube	80	98	102	-10	85	52	
13	Bing	56	56	64	-8	60	52	
2	**Facebook**	108	118	88	-16	78	51	
7	**Amazon**	50	70	98	-8	83	49	
8	Hulu	50	58	90	-12	85	47	
5	Twitter	74	82	86	-14	75	46	
10	ESPN	56	72	74	-30	75	46	
18	Yahoo! Search	54	60	52	-16	51	46	
11	Oath O&O	96	54	66	-28	60	44	
6	**Instagram**	70	78	100	-8	68	43	
17	Microsoft Display	54	44	62	-24	73	42	
16	Pinterest	52	58	62	-22	70	42	
14	LinkedIn	54	60	76	-26	77	38	
15	Snapchat	52	54	82	-24	63	38	
	TOTAL POSSIBLE SCORE	200	200	200	0 (-200)	170	130	

Value (Net):

Combination of ratings of brand in three categories:
- Value for money
- Ad results
- Pricing

Percentage of those who rate the brand 8-10 on a scale of 10, multiplied by 1.3

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

*Search: vol of conversions **Search: ROI

Advertiser Perceptions 32

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Total AIR Score: Google & FB brands in top 5 positions

AIR Score:

Calculation of sum of weighted ratings divided by the highest possible score (900)

AIR Score Rank	Top 18 in Buying Intention	BI	Must Buy	Must Buy Increasing Spend	Must Buy Decreasing Spend	Audience* (net)	Value** (net)	AIR SCORE
1	Google Search Ads	36	116	92	-10	117	59	.522
2	**Facebook**	108	118	88	-16	78	51	.474
3	Google Display Network	86	112	88	-10	78	55	.454
4	YouTube	80	98	102	-10	85	52	.452
6	**Instagram**	74	82	86	-14	75	46	.387
5	Twitter	70	78	100	-8	68	43	.390
7	**Amazon**	50	70	98	-8	83	49	.381
8	Hulu	50	58	90	-12	85	47	.353
9	**Facebook Messenger**	54	56	80	-22	87	55	.344
10	ESPN	58	56	54	-24	88	57	.325
11	Oath O&O	56	72	74	-30	75	46	.324
12	Pandora	96	54	66	-28	60	44	.322
13	Bing	56	56	64	-8	60	52	.311
14	LinkedIn	54	60	76	-26	77	38	.309
15	Snapchat	52	58	62	-22	70	42	.294
16	Pinterest	52	54	82	-24	63	38	.290
17	Microsoft Display	54	44	62	-24	73	42	.279
18	Yahoo! Search	54	60	52	-16	51	46	.274
	TOTAL POSSIBLE SCORE	200	200	200	0 (-200)	170	130	1.000

*Search: vol of conversions **Search: ROI

Advertiser Perceptions 33

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Change over past 6 months: Twitter, Instagram rising. FB loses ground

W28 Rank	Top 18 in Buying Intention	W27 AIR SCORE	W28 AIR SCORE	Change Wave over Wave
5	Twitter	.354	.387	.033
6	**Instagram**	**.360**	**.390**	**.030**
10	ESPN	.295	.325	.030
4	**YouTube**	**.428**	**.452**	**.024**
11	Oath O&O	.306	.324	.018
8	Hulu	.340	.353	.013
16	Pinterest	.281	.290	.009
3	**Google Display Network**	**.446**	**.454**	**.008**
7	**Amazon**	**.374**	**.381**	**.007**
9	**Facebook Messenger**	**.342**	**.344**	**.002**
15	Snapchat	.299	.294	-.005
12	Pandora	.339	.322	-.017
2	**Facebook**	**.492**	**.474**	**-.018**
14	LinkedIn	.331	.309	-.022
17	Microsoft Display	.318	.279	-.039
	TOTAL POSSIBLE SCORE	1.000	1.000	

W27 trending NA for search brands

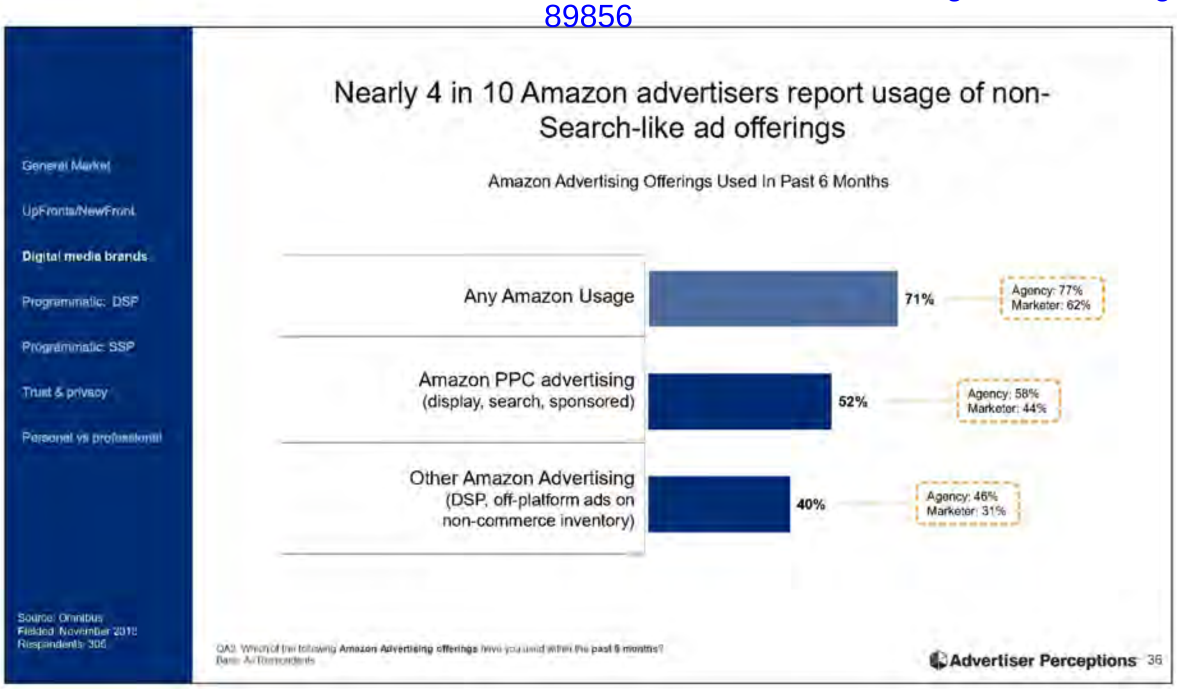
Advertiser Perceptions 34

Note: the numbers in the chart are weighted (BI, Must Buy, Must Buy Increase, Must Buy Decrease, 2X) (Audience Net, 1.7X) (Value Net, 1.3X)

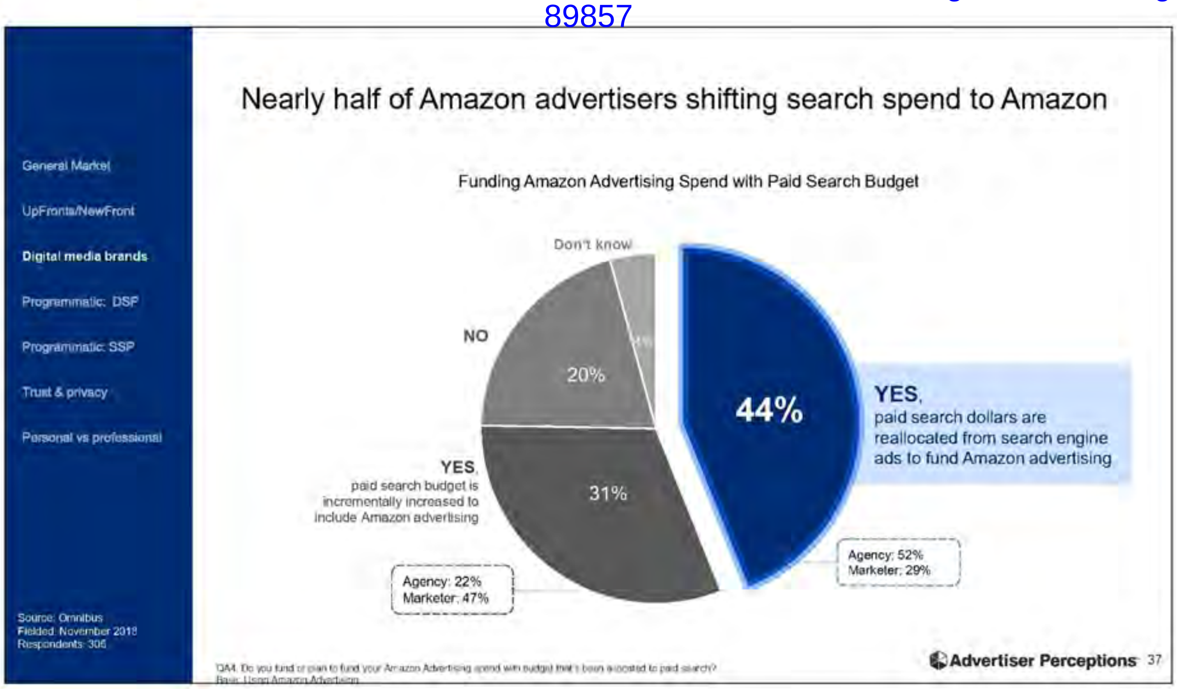
Amazon snapshot: search, display, programmatic

- Overall: Amazon continues to gain ground vs. Google in key selection driver ratings
- Search: Our first view of Amazon advertisers on impact to search spending
  - The "Amazon Effect" seems real and a direct hit on search allocation
  - . . . And disproportionately adversely impacting Google Ads
- Programmatic: Amazon Advertising DSP gaining in embrace at senior marketer levels
  - AMZN high levels coverage and communications a significant factor

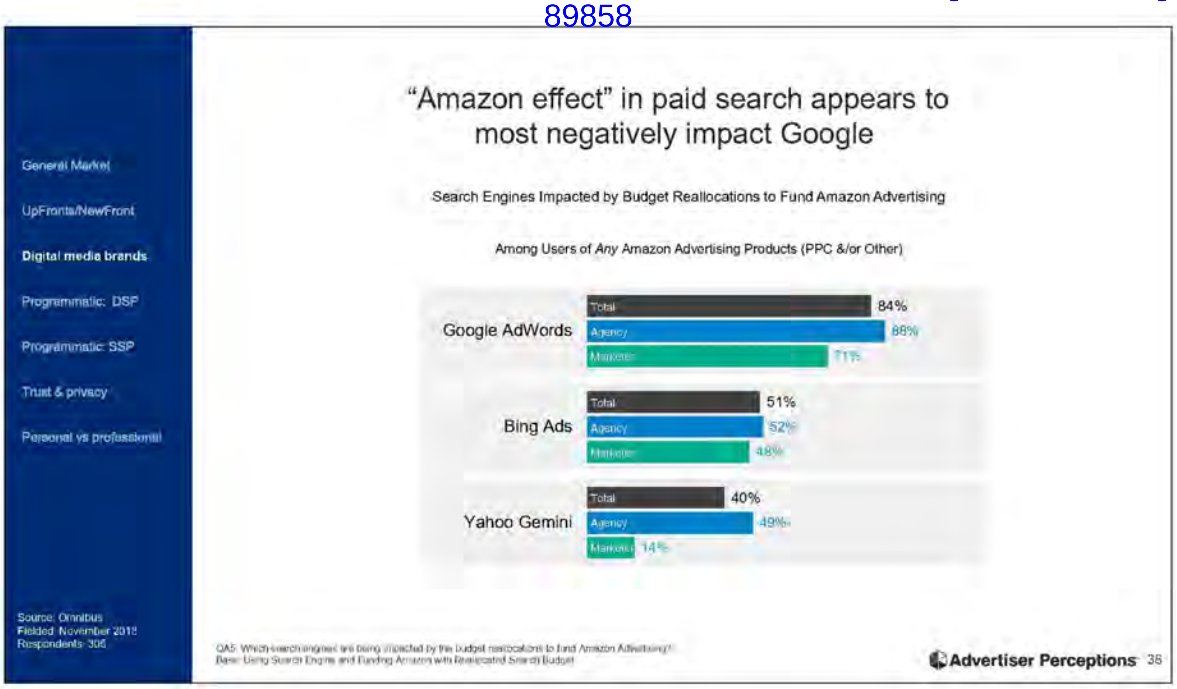
Advertiser Perceptions



INTERNAL FOR TEAM SAPPHIRE
QA3



INTERNAL FOR TEAM SAPPHIRE
QA4



INTERNAL FOR TEAM SAPPHIRE
QA5

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

From AIR view of Amazon Media Group: Amazon gaining ground vs Google brands

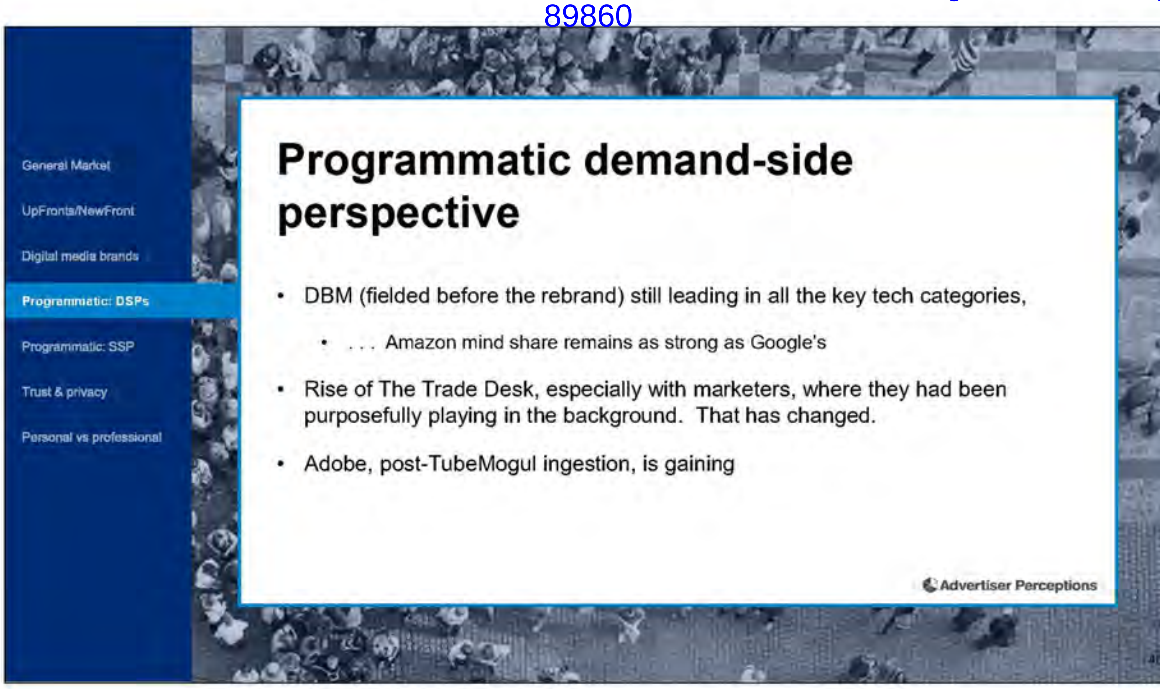
Percent Rating Media Brands 8-10 on a 10-Point Scale

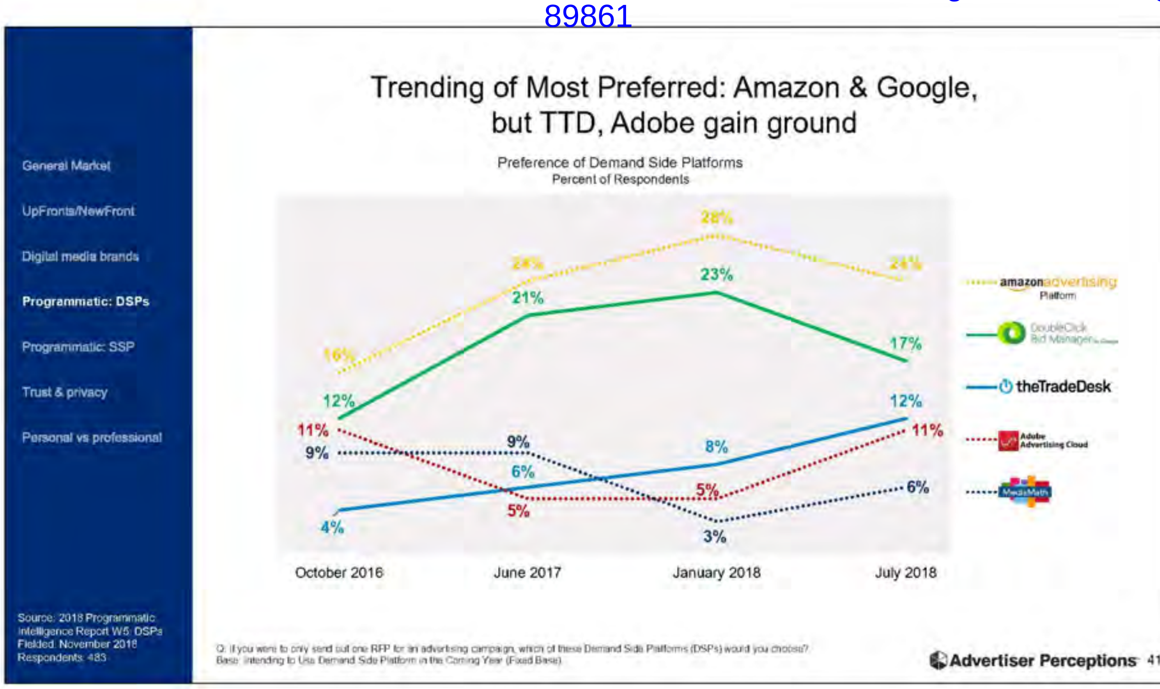
Value (net)		Cost/Price		Value for Money		Ad Results	
Google Search	45%	YouTube	40%	Amazon	41% ▲+5	Google Display Network	49%
Google Display Network	42%	Google Display Network	39%	Google Display Network	40% ▲+5	Amazon	41%
YouTube	40%	Amazon	33%	YouTube	40%	YouTube	40%
Amazon	38%						

Source: Advertiser Intelligence Report W28
Fielded: June/July 2018
Respondents: 2,000+

Q: How well do these brands rate on the following criteria? Audience (net): Audience Reach, Audience Composition, and Audience Engagement
Base: Digital Respondents Considering Media Brand
Arrows: Above AIR W28 by 5+ points is GREEN; Below AIR W28 by 5+ points is RED

Advertiser Perceptions 39


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional
Programmatic demand-side perspective
• DBM (fielded before the rebrand) still leading in all the key tech categories,
• . . . Amazon mind share remains as strong as Google's
• Rise of The Trade Desk, especially with marketers, where they had been purposefully playing in the background. That has changed.
• Adobe, post-TubeMogul ingestion, is gaining
Advertiser Perceptions


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional
Trending of Most Preferred: Amazon & Google, but TTD, Adobe gain ground
Preference of Demand Side Platforms
Percent of Respondents
16%
24%
28%
24%
12%
21%
23%
17%
11%
9%
9%
6%
5%
4%
8%
5%
3%
12%
11%
6%
October 2016
June 2017
January 2018
July 2018
amazonadvertising Platform
DoubleClick Bid Manager
theTradeDesk
Adobe Advertising Cloud
MediaMath
Source: 2018 Programmatic Intelligence Report W5: DSPs Fielded: November 2018 Respondents: 483
Q: If you were to only send out one RFP for an advertising campaign, which of these Demand Side Platforms (DSPs) would you choose?
Base: Intending to Use Demand Side Platform in the Coming Year (Fixed Base)
Advertiser Perceptions 41

Q226

- General Market
- UpFronts/NewFront
- Digital media brands
- **Programmatic: DSPs**
- Programmatic: SSP
- Trust & privacy
- Personal vs professional

Thoughts on Amazon and The Trade Desk

Why is Amazon perceived as a leader?

- Google wins in technology & analytics ratings,
  - but Amazon has marketer—especially senior marketer strength
- Strengths in numbers: significantly ahead of Google in coverage and communication
- Amazon leads Google in VP+ title stated usage of DSPs (43% to 27% past usage)

Why is TTD accelerating?

- They were almost entirely agency focused -- agency advocates
- Biggest shifts in July study are with marketers—coverage, attention, embrace of TTD story:
  - UX ease of use, high-touch service model, training

Advertiser Perceptions 42

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional

Funnel metrics snapshot: Amazon & DBM lead

Key Metrics Among Demand Side Platforms (Core Brands)
Percent of Respondents/Score

Familiarity (8-10)			Usage			Consideration (8-10)			Buying Intention (8-10)			Net Promoter Score (NPS)		
1	amazon advertising Platform	48%	1	amazon advertising Platform	41%	1	DoubleClick Bid Manager	50%	1	amazon advertising Platform	43%	1	[illegible]	35
1	DoubleClick Bid Manager	48%	2	DoubleClick Bid Manager	35%	1	amazon advertising Platform	50%	2	DoubleClick Bid Manager	41%	2	theTradeDesk	34
3	theTradeDesk	44%	3	theTradeDesk	26%	3	theTradeDesk	43%	3	theTradeDesk	36%	3	Adobe Advertising Cloud	32
4	Adobe Advertising Cloud	39%	4	Adobe Advertising Cloud	20%	4	Adobe Advertising Cloud	39%	4	Adobe Advertising Cloud	33%	4	DoubleClick Bid Manager	27
5	[illegible]	35%	5	[illegible]	19%	5	[illegible]	37%	5	[illegible]	29%	5	amazon advertising Platform	21

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

Advertiser Perceptions 43

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional

Where TTD is accelerating or keeping pace with Google

Intention (Marketer)	June '17 Wave 3	July '18 Wave 5
DoubleClick Bid Manager by Google	41%	46%
theTradeDesk	**33%**	**40%**

Single Preferred DSP (Marketer)	June '17 Wave 3	July '18 Wave 5
DoubleClick Bid Manager by Google	24%	19%
theTradeDesk	**3%**	**12%**

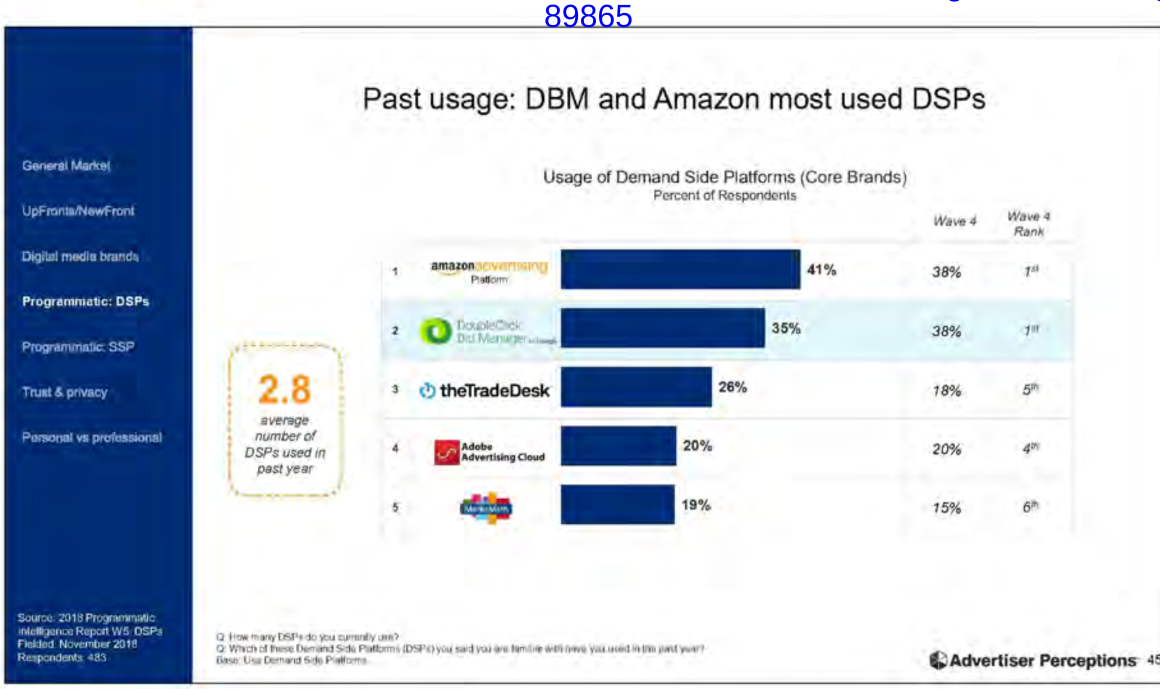
Net Promoter Score (Agency)	June '17 Wave 3	July '18 Wave 5
DoubleClick Bid Manager by Google	21	26
theTradeDesk	**14**	**30**

Net Promoter Score (Marketer)	June '17 Wave 3	July '18 Wave 5
DoubleClick Bid Manager by Google	16	28
theTradeDesk	**27**	**39**

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?
Base: Use Demand Side Platforms
Q: If you were to only send out one RFP for an advertising campaign, which of these Demand Side Platforms (DSPs) would you choose?
Base: Intending to Use Demand Side Platform in the Coming Year (Fixed Base)
Q: How likely would you be to recommend to a colleague the Demand Side Platform(s) (DSPs) you have used in the past year?
Base: Use Demand Side Platforms (Variable Base)

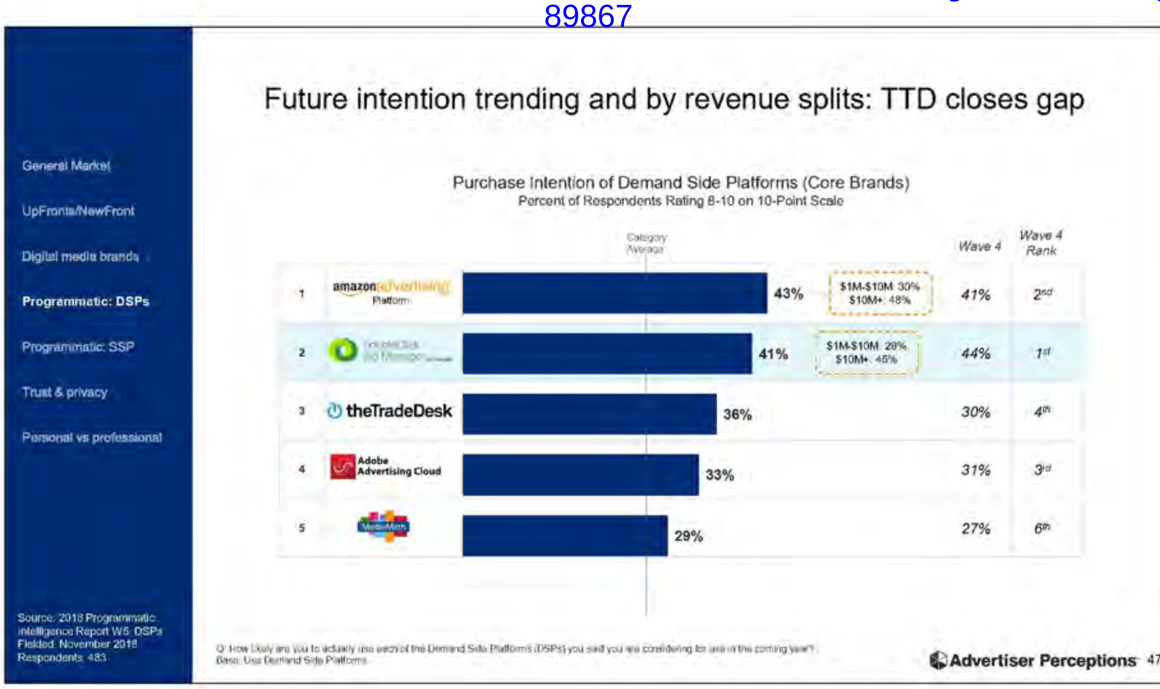
Advertiser Perceptions 44


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional
Past usage: DBM and Amazon most used DSPs
Usage of Demand Side Platforms (Core Brands)
Percent of Respondents
Wave 4
Wave 4 Rank
2.8
average number of DSPs used in past year
1
amazon advertising Platform
41%
38%
1st
2
DoubleClick Bid Manager
35%
38%
1st
3
theTradeDesk
26%
18%
5th
4
Adobe Advertising Cloud
20%
20%
4th
5
19%
15%
6th
Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483
Q: How many DSPs do you currently use?
Q: Which of these Demand Side Platforms (DSPs) you said you are familiar with have you used in the past year?
Base: Use Demand Side Platforms
Advertiser Perceptions
45

Q206, Q215


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional
Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483
Self-serve or managed service? DBM evenly split.
Note The Trade Desk vs. Amazon
Demand Side Platform Service Models (Core Brands)
Percent of Respondents
Self-Service
theTradeDesk 42%
Adobe Advertising Cloud 37%
DoubleClick Bid Manager 36%
amazon advertising Platform 31%
MediaMath 23%
Managed Service
amazon advertising Platform 45%
MediaMath 44%
DoubleClick Bid Manager 35%
Adobe Advertising Cloud 34%
theTradeDesk 28%
Q: Which best describes the way that you typically work with each DSP?
Base: Use Demand Side Platforms
Advertiser Perceptions 46

Q216 NEW



Future intention trending and by revenue splits: TTD closes gap
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional
Purchase Intention of Demand Side Platforms (Core Brands)
Percent of Respondents Rating 8-10 on 10-Point Scale
Category Average
Wave 4
Wave 4 Rank
1
amazon advertising Platform
43%
$1M-$10M: 30%
$10M+: 48%
41%
2nd
2
41%
$1M-$10M: 29%
$10M+: 45%
44%
1st
3
theTradeDesk
36%
30%
4th
4
Adobe Advertising Cloud
33%
31%
3rd
5
29%
27%
6th
Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483
Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?
Base: Use Demand Side Platforms
Advertiser Perceptions 47

Q225

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSPs

Programmatic: SSP

Trust & privacy

Personal vs professional

Agency vs. marketer intentions: AAP & DBM lead; note TTD jump with marketers

Purchase Intention of Demand Side Platforms (Core Brands)
Percent of Respondents Rating 8-10 on 10-Point Scale

AGENCIES

			Wave 4	Wave 4 Rank
1	amazon advertising Platform	37%	33%	2nd
2	DoubleClick Bid Manager	36%	42%	1st
3	theTradeDesk	32%	30%	3rd
4	Adobe Advertising Cloud	32%	29%	4th
5	MediaMath	22%	22%	6th

MARKETERS

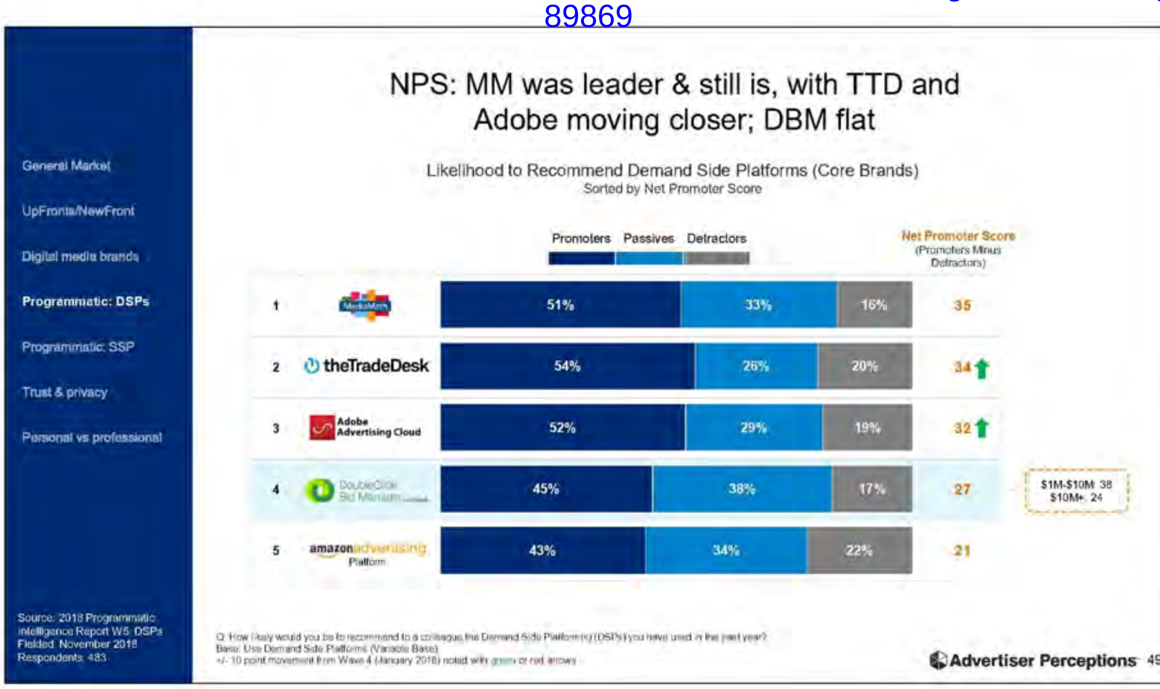
			Wave 4	Wave 4 Rank
1	amazon advertising Platform	50%	51%	1st
2	DoubleClick Bid Manager	46%	46%	2nd
3	theTradeDesk	40%	30%	6th
4	MediaMath	37%	32%	4th
5	Adobe Advertising Cloud	35%	33%	3rd

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

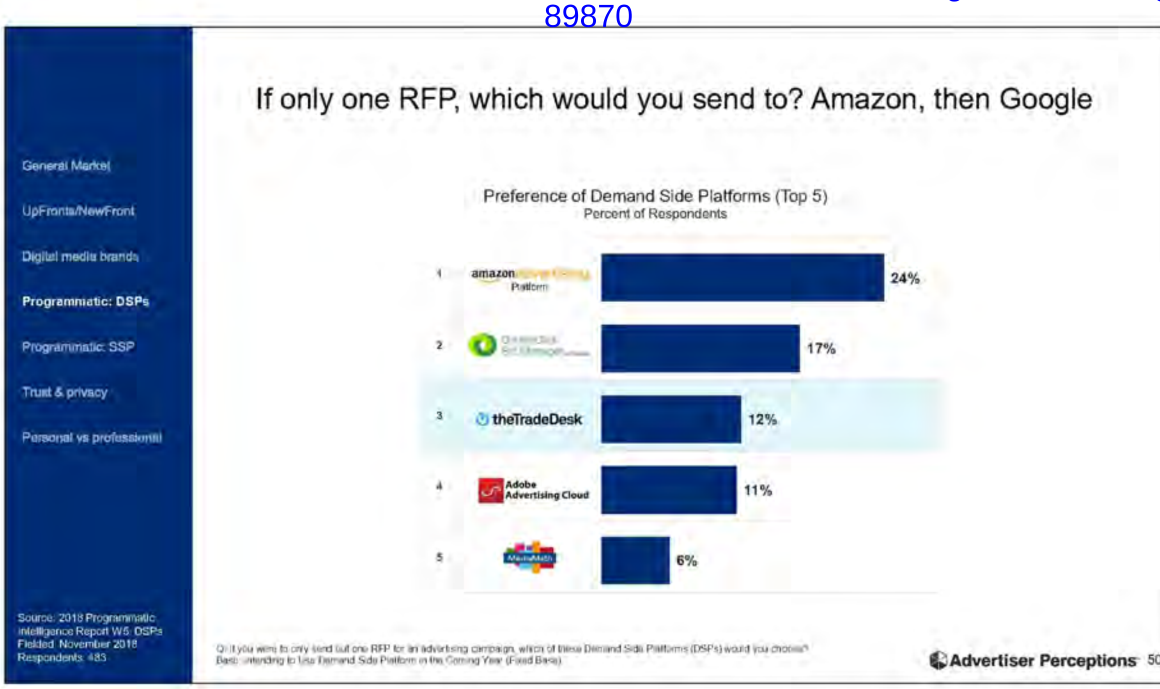
Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?
Base: Use Demand Side Platforms

Advertiser Perceptions 48

HIGHLY CONFIDENTIAL GOOG-DOJ-AT-00825797


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional
NPS: MM was leader & still is, with TTD and Adobe moving closer; DBM flat
Likelihood to Recommend Demand Side Platforms (Core Brands)
Sorted by Net Promoter Score
Promoters Passives Detractors
Net Promoter Score (Promoters Minus Detractors)
1 MediaMath 51% 33% 16% 35
2 theTradeDesk 54% 26% 20% 34
3 Adobe Advertising Cloud 52% 29% 19% 32
4 DoubleClick Bid Manager 45% 38% 17% 27
$1M-$10M: 38
$10M+: 24
5 amazon advertising Platform 43% 34% 22% 21
Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483
Q: How likely would you be to recommend to a colleague the Demand Side Platform(s) (DSPs) you have used in the past year?
Base: Use Demand Side Platforms (Variable Base)
+/- 10 point movement from Wave 4 (January 2018) noted with green or red arrows
Advertiser Perceptions
49

Q230


If only one RFP, which would you send to? Amazon, then Google
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional
Preference of Demand Side Platforms (Top 5)
Percent of Respondents
1
amazon
Platform
24%
2
17%
3
theTradeDesk
12%
4
Adobe Advertising Cloud
11%
5
6%
Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483
Advertiser Perceptions
50

Q226

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional

DoubleClick Bid Manager by Google

As primary DSP for top spenders:
Google's brand strength comes through

*DoubleClick is **the leader and gold standard for DSP'**s in my opinion. The world's top marketing companies, ad networks, agencies, publishers, etc., all use DoubleClick Bid Manager. There is a reason for that.*
- Agency, C-level

*It has historically provided the **most consistent performance***
- Agency Supervisor

***Power of Google** behind it*
- Agency Supervisor

*They have the **best tech stack***
- Agency VP

*Both the **familiarity** we have with DoubleClick and ease of use are major factors. It's about trust and the **controls they have in place for brand safety**, etc.*
- Marketer, Director

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

Q: What does that DSP do or offer that makes them your primary choice?
Base: Intending to Use Demand Side Platform in the Coming Year (Fixed Base)

Advertiser Perceptions 51

Q226a

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional

theTradeDesk

As primary DSP:

Note the specificity on function, tech, UX

__Best reporting interface, high level of customer service, more integrations than competitors__
- Agency, Manager

Because of its approach of __incorporating every possible delivery channel, creating a platform to enact all an agency's buys__, and helping to move the industry towards further programmatic adoption.
- Marketer, C-level

Ability to do __retargeting and other targeting__ some other DSPs cannot do (i.e., DBM)
- Marketer, Supervisor

__Interface, team experience__, and breadth of what we can do in their platform.
- Agency Director

They offer __targeting__ capabilities of individuals, like the ability to __ingest client-provided lists__ for targeting, that makes them attractive.
- Agency VP

__Analytical Insight into customer journey,__ attribution and conversion rates, scope of market capabilities and practical planning and management solutions
- Marketer, C-level

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

Q: What does that DSP do or offer that makes them your primary choice?
Base: Intending to Use Demand Side Platform in the Coming Year (Fixed Base)

Advertiser Perceptions 52

Q226a

amazonadvertising Platform

As primary DSP:
eCommerce relationships and integration

*I have so **many** other **business relationships with Amazon** that it makes for **frictionless** partnership when Amazon in my primary choice*
- Marketer, VP

*Its **stability** and **innovation** are excellent.*
- Agency Director

Integration**—both business and technical—with the **universe of Amazon products, services, and brands
- Marketer, VP

*They have **integrated technologies** which significantly improves its targeting and production capabilities. I liked their **results driven by a team of professionals** sponsored by Amazon.*
- Agency Director

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

Q: What does that DSP do or offer that makes them your primary choice?
Base: Intending to Use Demand Side Platform in the Coming Year (Fixed Base)

Advertiser Perceptions 53

Q226a

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional

Determining drivers influencing plans to use DSPs

TECH CRITERIA:

5. Audience scale or reach
6. Audience targeting capabilities

10. Proven track record and a solid industry reputation

ANALYTICS AND INSIGHTS CRITERIA:

1. Ability to export data to analytics platform of your choice

ACCOUNT MANAGEMENT / CLIENT RELATIONSHIP CRITERIA:

1. Technology expertise, vision, and clearly articulated roadmap

4. Customer service, responsiveness, and support

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?
Base: Total Respondents Q. How would you rate each Demand Side Platform (DSP) on the following criteria?
Q. Based on your own experience, please rate each Demand Side Platform (DSP) on the research and insights they provide.
Q. Based on your own experience, please rate each Demand Side Platform (DSP) based on the following account management and client relationship capabilities/characteristics. Base: Considering Demand Side Platform in the Coming Year (Variable Base)
Regression Analysis is a statistical method designed to derive the relationship between characteristics and/or behaviors. Advertiser Perceptions utilizes regression analysis to show relationships between selection criteria and their influence on plans to buy. The analysis determines which criteria have the greatest impact on achieving the desired results.

Advertiser Perceptions 54

Q235, Q240, Q245

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSPs
Programmatic: SSP
Trust & privacy
Personal vs professional

Google leads in top 3 metrics, dominant in most important

Highly Impressed with Demand Side Platforms (Core Brands)
Percent Rating 8-10 on a 10-Point Scale

Proven Track Record and a Solid Industry Foundation *Driver Index: 171*	Audience Targeting Capabilities *Driver Index: 152*	Audience Scale or Reach *Driver Index: 136*	Ability to export data to analytics platform of your choice *Driver Index: 135*	Technology Expertise, Vision, and Clearly Articulated Roadmap *Driver Index: 211*	Customer Service, Responsiveness, and Support *Driver Index: 115*
DoubleClick Bid Manager 72%	DoubleClick Bid Manager 57%	DoubleClick Bid Manager 59%	MediaMath 48%	DoubleClick Bid Manager 53%	amazon advertising 48%
MediaMath 59%	MediaMath 54%	theTradeDesk 54%	Adobe Advertising Cloud 48%	amazon advertising 51%	theTradeDesk 47%
theTradeDesk 52%	amazon advertising 53%	amazon advertising 54%	DoubleClick Bid Manager 46%	theTradeDesk 48%	MediaMath 47%
amazon advertising 48%	theTradeDesk 51%	MediaMath 53%	theTradeDesk 46%	MediaMath 47%	DoubleClick Bid Manager 43%
Adobe Advertising Cloud 46%	Adobe Advertising Cloud 43%	Adobe Advertising Cloud 44%	amazon advertising 41%	Adobe Advertising Cloud 45%	Adobe Advertising Cloud 42%

Source: 2018 Programmatic Intelligence Report W5: DSPs
Fielded: November 2018
Respondents: 483

Q: How would you rate each Demand Side Platform (DSP) on the following criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering Demand Side Platform in the Coming Year (Variable Base)
+/-5 point movement from Wave 4 (Jan 2018) noted with green or red arrows

Advertiser Perceptions 55

Q235

Platform Perceptions

Communication & coverage: DBM trails competitors

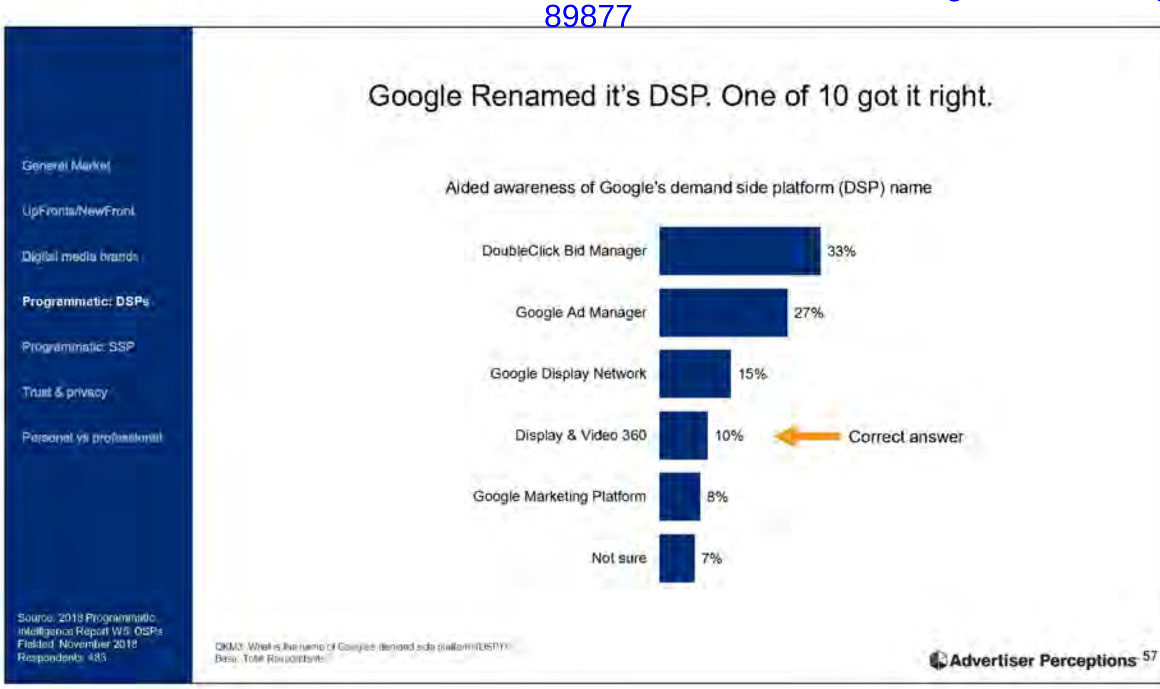
Sales Coverage by Demand Side Platforms (Core Brands)
Percent of Respondents

Any Communication		Spoken to a Sales Rep via Telephone or Email		Met with Sales Rep In-Person	
amazon advertising	78%	amazon advertising	53%	MediaMath	25%
Adobe Advertising Cloud	78%	Adobe Advertising Cloud	40%	Adobe Advertising Cloud	24%
MediaMath	75%	DoubleClick Bid Manager	39%	theTradeDesk	23%
theTradeDesk	75%	theTradeDesk	36%	DoubleClick Bid Manager	18%
DoubleClick Bid Manager	66%	MediaMath	33%	amazon advertising	16%

Q: For each Demand Side Platform (DSP), please indicate whether in the past 90 days you have...
Base: Considering Demand Side Platform in the Coming Year (Variable Base)

Advertiser Perceptions 56

Q250

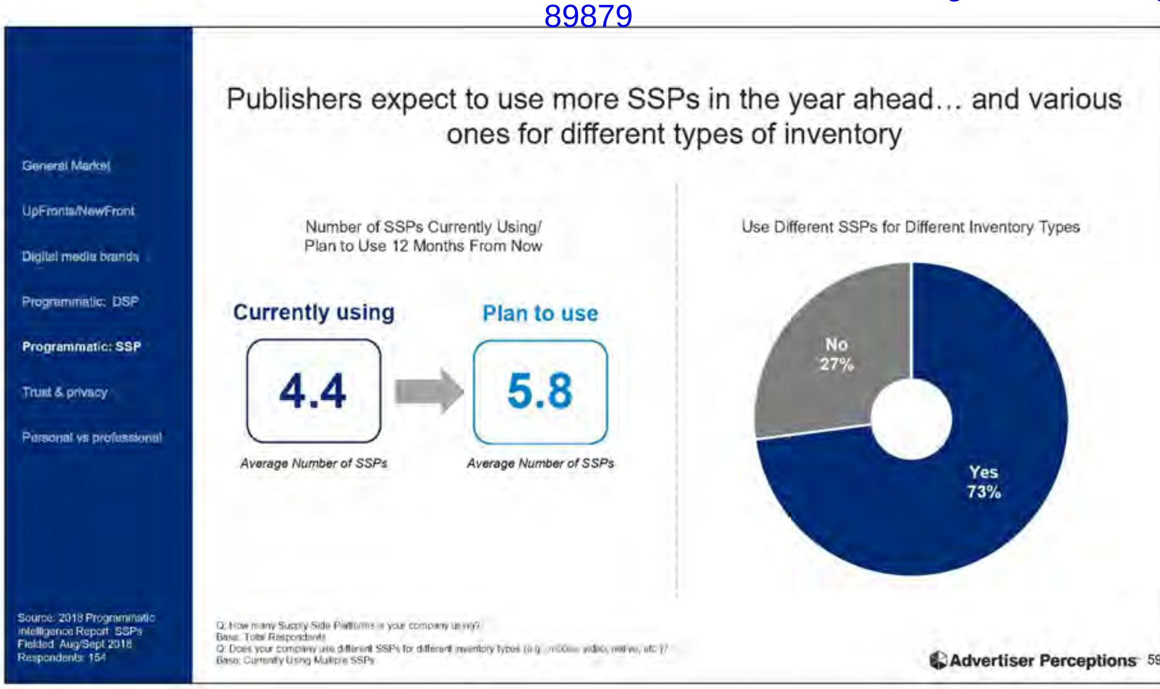


INTERNAL – KEVIN
QKM3

2018 Programmatic Intelligence Report: SSPs

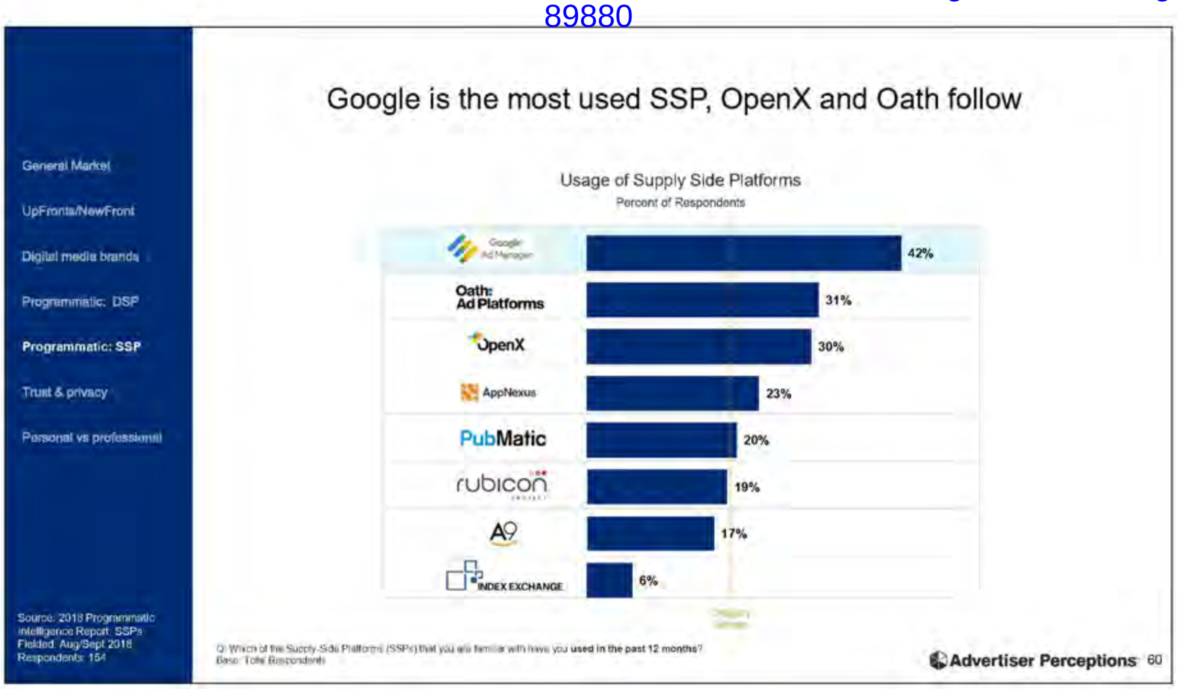
- Google dominates in funnel metrics, but red flags in selection driver perceptions
- A return to competitiveness for two of the original 3 SSPs
  - Pubmatic, Rubicon
- Willingness of publishers to use many (avg = nearly 6)
  - Opportunity for many to vie for 2nd

Advertiser Perceptions



Publishers expect to use more SSPs in the year ahead… and various ones for different types of inventory
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Number of SSPs Currently Using/ Plan to Use 12 Months From Now
Currently using
4.4
Average Number of SSPs
Plan to use
5.8
Average Number of SSPs
Use Different SSPs for Different Inventory Types
No 27%
Yes 73%
Source: 2018 Programmatic Intelligence Report: SSPs
Fielded: Aug/Sept 2018
Respondents: 154
Q: How many Supply Side Platforms is your company using?
Base: Total Respondents
Q: Does your company use different SSPs for different inventory types
Base: Currently Using Multiple SSPs
Advertiser Perceptions 59

Q50, Q55


Google is the most used SSP, OpenX and Oath follow
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Usage of Supply Side Platforms
Percent of Respondents
Google Ad Manager
42%
Oath: Ad Platforms
31%
OpenX
30%
AppNexus
23%
PubMatic
20%
rubicon
19%
A9
17%
INDEX EXCHANGE
6%
Source: 2018 Programmatic Intelligence Report: SSPs
Fielded: Aug/Sept 2018
Respondents: 154
Q: Which of the Supply-Side Platforms (SSPs) that you are familiar with have you used in the past 12 months?
Base: Total Respondents
Advertiser Perceptions
60

Q115

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

Intention leaders: Google, then YFP

Percent of Respondents Rating 8-10 on 10-Point Scale

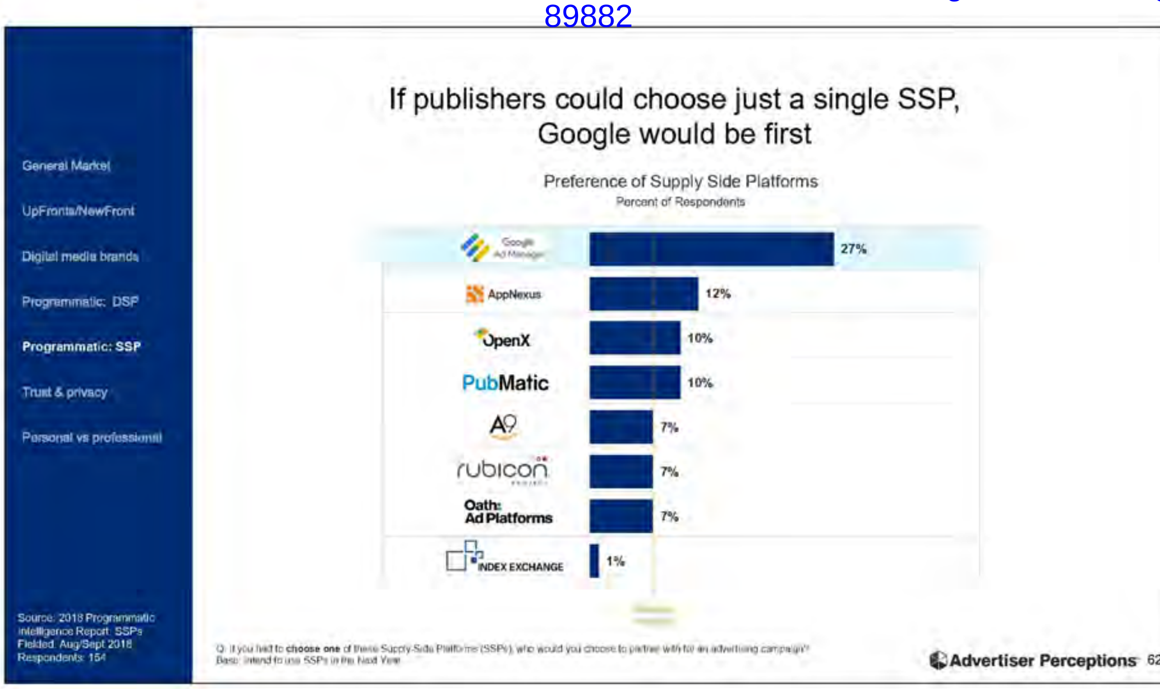
Usage: future intention		
1	Google Ad Manager	64%
2	Oath: Ad Platforms	52%
3	AppNexus	48%
4	OpenX	47%
5	PubMatic	46%
6	A9	46%
7	mopub	44%
8	①	43%
9	rubicon	43%
10	SPOTX	43%
11	telaria	41%
12	INDEX EXCHANGE	38%
13	NATIVO	37%
14	SHARETHROUGH	37%
15	Teads	34%

Source: 2018 Programmatic Intelligence Report: SSPs
Fielded: Aug/Sept 2018
Respondents: 154

Q: How likely are you to actually use the Supply Side Platforms (SSPs) that you said you are considering for use in the next 12 months? (1 = Not at all Likely to use; 10 = Very Likely to use) Base: Total Respondents

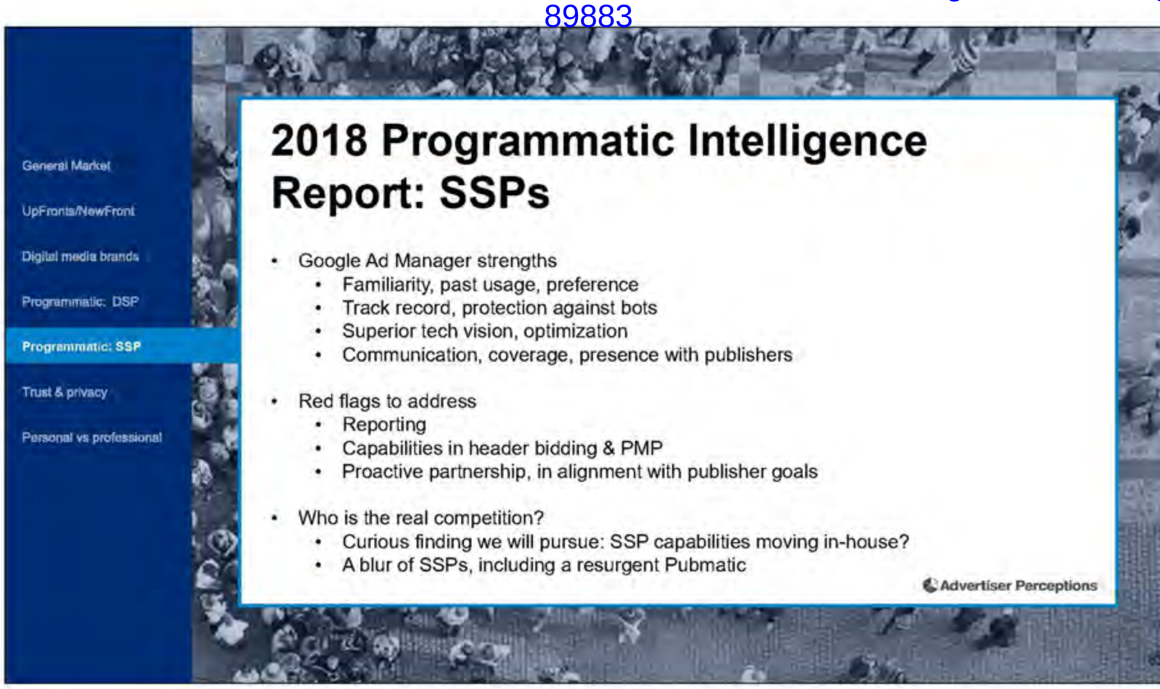
Advertiser Perceptions

Q125



If publishers could choose just a single SSP, Google would be first
Preference of Supply Side Platforms
Percent of Respondents
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
AppNexus
OpenX
PubMatic
rubicon
Oath:
Ad Platforms
INDEX EXCHANGE
27%
12%
10%
10%
7%
7%
7%
1%
Source: 2018 Programmatic Intelligence Report: SSPs
Fielded: Aug/Sept 2018
Respondents: 154
Q: If you had to choose one of these Supply-Side Platforms (SSPs), who would you choose to partner with for an advertising campaign?
Base: Intend to use SSPs in the Next Year
Advertiser Perceptions
62

Q126


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
2018 Programmatic Intelligence Report: SSPs
• Google Ad Manager strengths
• Familiarity, past usage, preference
• Track record, protection against bots
• Superior tech vision, optimization
• Communication, coverage, presence with publishers
• Red flags to address
• Reporting
• Capabilities in header bidding & PMP
• Proactive partnership, in alignment with publisher goals
• Who is the real competition?
• Curious finding we will pursue: SSP capabilities moving in-house?
• A blur of SSPs, including a resurgent Pubmatic
Advertiser Perceptions

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

We ask publishers to evaluate SSPs in 4 categories, across 28 criteria

Performance Capabilities Criteria:

3. Track record of protection against bad ads, bots, fraud

Platform Capabilities Criteria:

5. Visibility into accurate, available inventory
7. PMP capabilities

Partnership Criteria:

5. Proactively share reports, analytics and insights that enable us to make better decisions

Vision Criteria:

5. Inspire confidence that our company will succeed in partnership with them

Source: 2018 Programmatic Intelligence Report: SSPs
Fielded: Aug/Sept 2018
Respondents: 154

Advertiser Perceptions

General Market

UpFronts/NewFront

Digital media brands

Programmatic: DSP

Programmatic: SSP

Trust & privacy

Personal vs professional

The 5 key criteria across the categories of performance, capabilities, partnership, and vision

Index of "Key Drivers" Regression to Usage Intentions

We ask Publishers to evaluate SSPs on

Performance Capabilities Criteria		Platform Capabilities Criteria		Platform Capabilities Criteria		Partnership Criteria		Vision Criteria	
Track record of protection against bad ads, bots, fraud		Visibility into accurate, available inventory		PMP capabilities		Proactively share reports, analytics and insights that enable better decisions		Inspire confidence that our company will succeed in partnership with them	
Index Exchange	71%	Index Exchange	75%	PubMatic	75%	AppNexus	72%	PubMatic	74%
Google Ad Manager	69%	Oath: Ad Platforms	70%	Oath: Ad Platforms	73%	PubMatic	68%	Oath: Ad Platforms	73%
Oath: Ad Platforms	59%	Google Ad Manager	69%	Index Exchange	71%	Oath: Ad Platforms	68%	Index Exchange	69%
A9	58%	AppNexus	66%	OpenX	64%	rubicon	67%	OpenX	68%
OpenX	57%	rubicon	65%	A9	63%	A9	63%	Google Ad Manager	67%
rubicon	57%	OpenX	63%	AppNexus	63%	Index Exchange	63%	AppNexus	67%
PubMatic	56%	A9	62%	rubicon	62%	OpenX	61%	rubicon	62%
AppNexus	50%	PubMatic	56%	Google Ad Manager	52%	Google Ad Manager	55%	A9	60%

Source: 2018 Programmatic Intelligence Report: SSPs
Fielded: Aug/Sept 2018
Respondents: 154

Q. How likely are you to actually use each of the Supply-Side Platforms (SSPs) you said you are considering for use in the coming year? Base: Total Respondents. Q: How would you rate this Supply-Side Platform (SSP) on the following **performance capabilities**? Base: Considering Supply-Side Platform in the Coming Year (Variable Base)

Regression Analysis is a statistical method designed to derive the relationship between characteristics and/or behaviors. Advertiser Perceptions utilizes regression analysis to show relationships between selection criteria and their influence on plans to use. The analysis determines which criteria have the greatest impact on achieving the desired results.

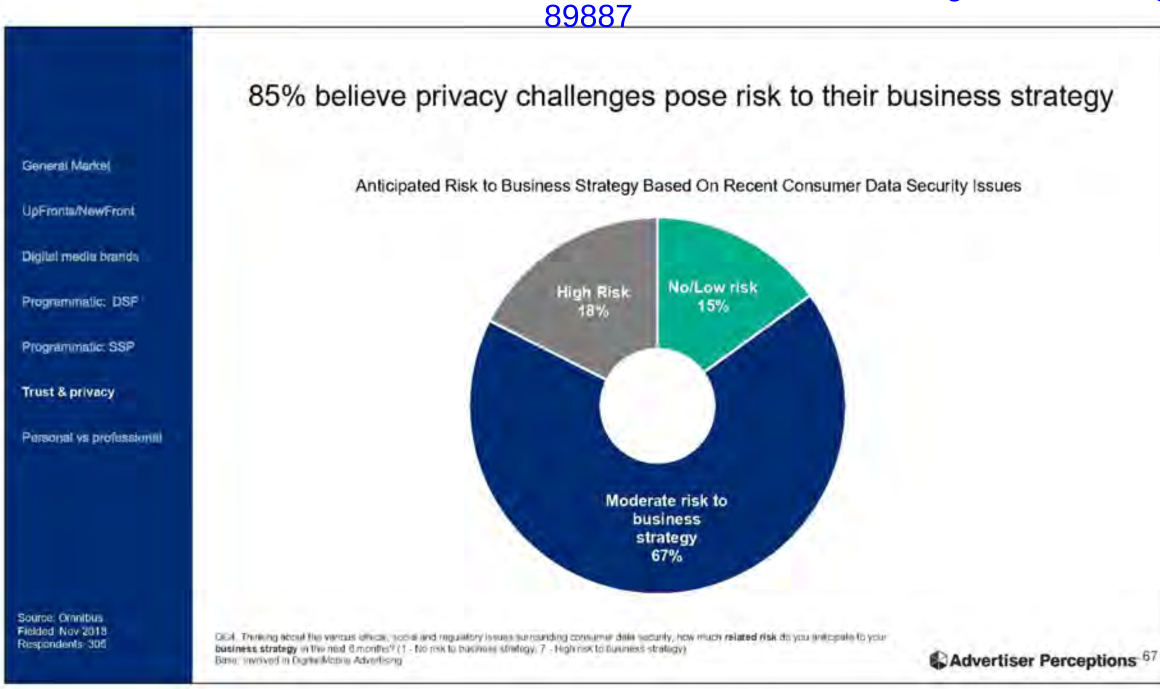
Advertiser Perceptions 65

Q140

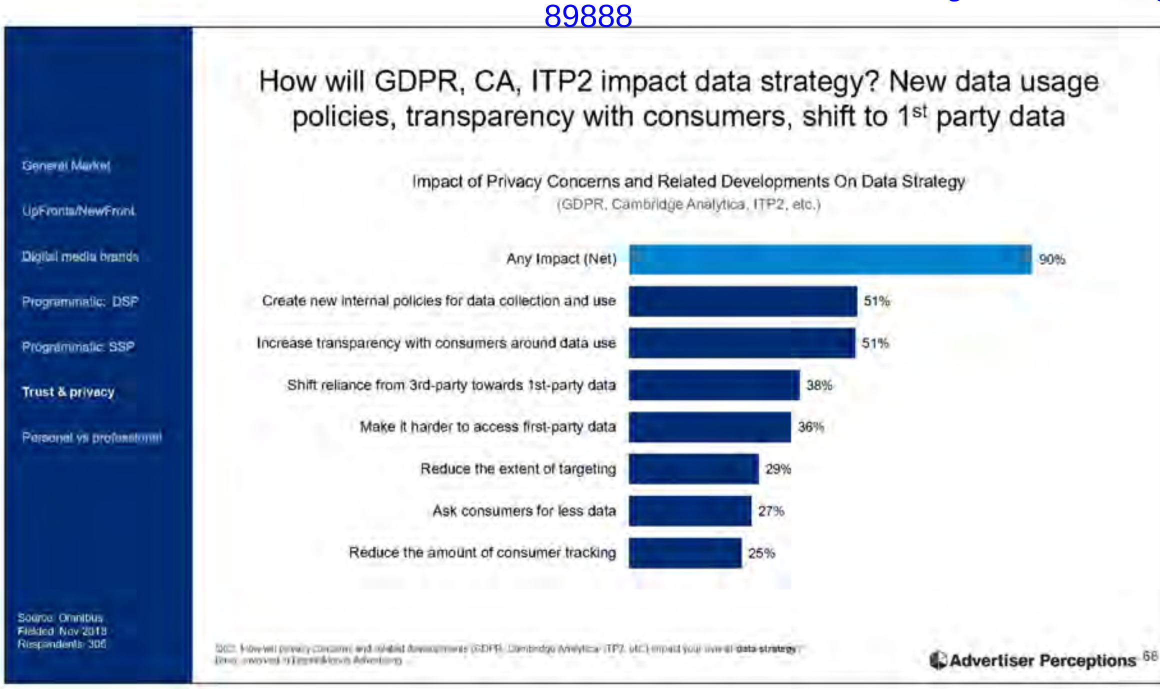
Advertiser Perspectives of Trust & Privacy

- Overwhelming majority believe data privacy is a strategic business concern
  - Expect changes in data usage policies, transparency with consumers, & shifting from 3rd to 1st party data reliance
- Google fares better than other brands, especially FB, in protecting user data
  - But no media brand viewed as exceptionally trustworthy in this regard
  - . . . And marketers are far more skeptical than agencies in their view

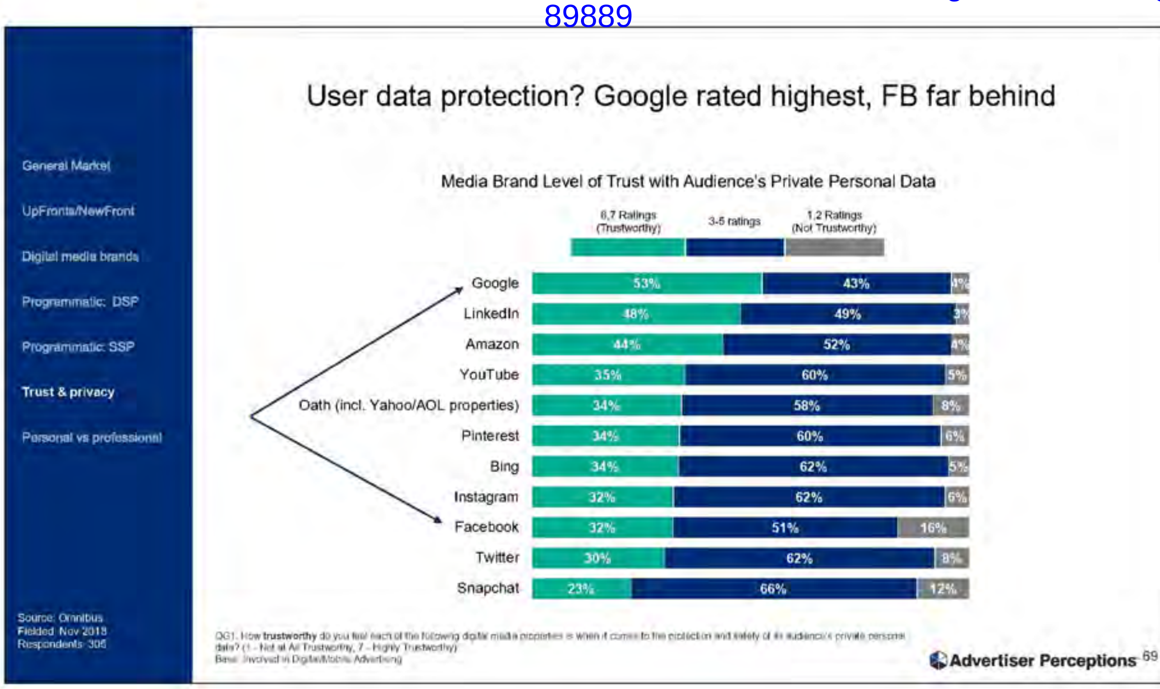
Advertiser Perceptions


85% believe privacy challenges pose risk to their business strategy
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Anticipated Risk to Business Strategy Based On Recent Consumer Data Security Issues
High Risk 18%
No/Low risk 15%
Moderate risk to business strategy 67%
Source: Omnibus
Fielded: Nov 2018
Respondents: 306
QG4. Thinking about the various ethical, social and regulatory issues surrounding consumer data security, how much related risk do you anticipate to your business strategy in the next 6 months? (1 - No risk to business strategy, 7 - High risk to business strategy)
Base: involved in Digital/Mobile Advertising
Advertiser Perceptions
67

GOOGLE
QG4

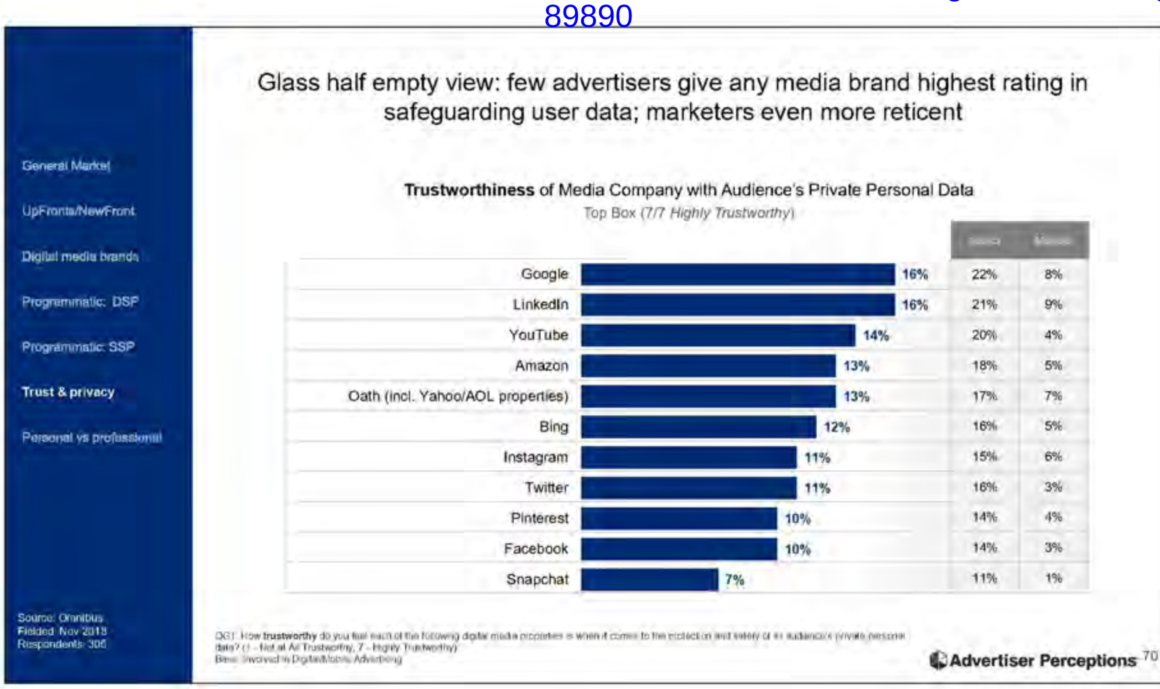

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Source: Omnibus
Fielded: Nov 2018
Respondents: 306
How will GDPR, CA, ITP2 impact data strategy? New data usage policies, transparency with consumers, shift to 1st party data
Impact of Privacy Concerns and Related Developments On Data Strategy
(GDPR, Cambridge Analytica, ITP2, etc.)
Any Impact (Net) 90%
Create new internal policies for data collection and use 51%
Increase transparency with consumers around data use 51%
Shift reliance from 3rd-party towards 1st-party data 38%
Make it harder to access first-party data 36%
Reduce the extent of targeting 29%
Ask consumers for less data 27%
Reduce the amount of consumer tracking 25%
Advertiser Perceptions
68

GOOGLE
QG3

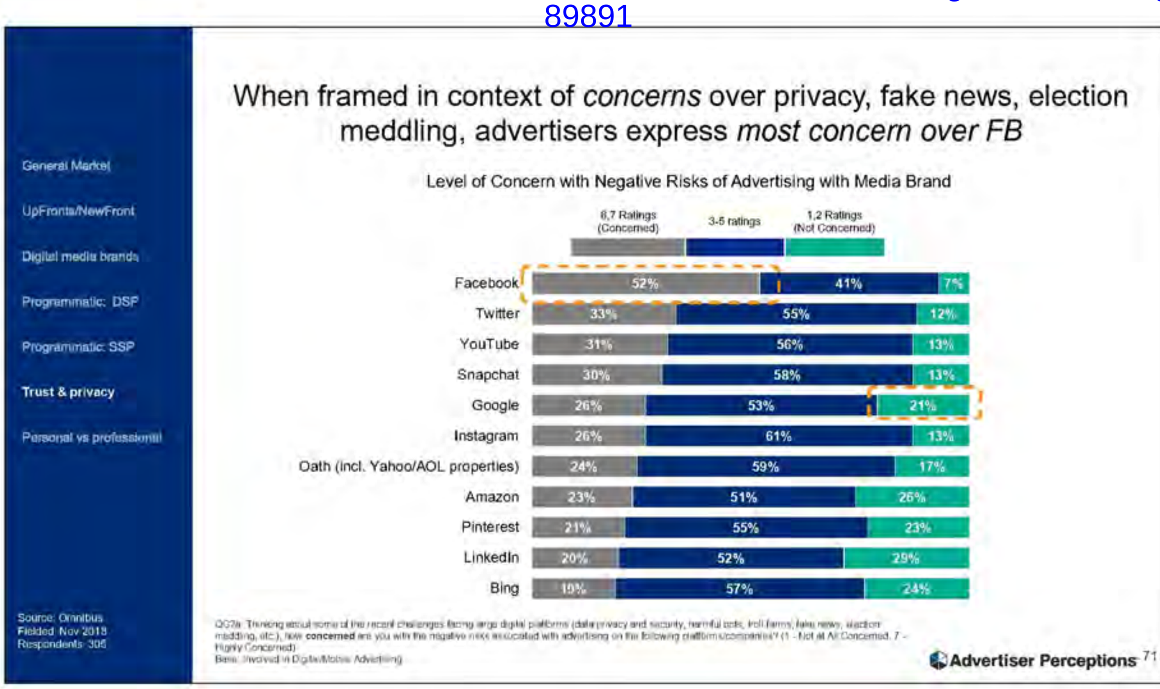


User data protection? Google rated highest, FB far behind
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Media Brand Level of Trust with Audience's Private Personal Data
6,7 Ratings (Trustworthy)
3-5 ratings
1,2 Ratings (Not Trustworthy)
Google 53% 43% 4%
LinkedIn 48% 49% 3%
Amazon 44% 52% 4%
YouTube 35% 60% 5%
Oath (incl. Yahoo/AOL properties) 34% 58% 8%
Pinterest 34% 60% 6%
Bing 34% 62% 5%
Instagram 32% 62% 6%
Facebook 32% 51% 16%
Twitter 30% 62% 8%
Snapchat 23% 66% 12%
Source: Omnibus
Fielded: Nov 2018
Respondents: 305
Advertiser Perceptions 69

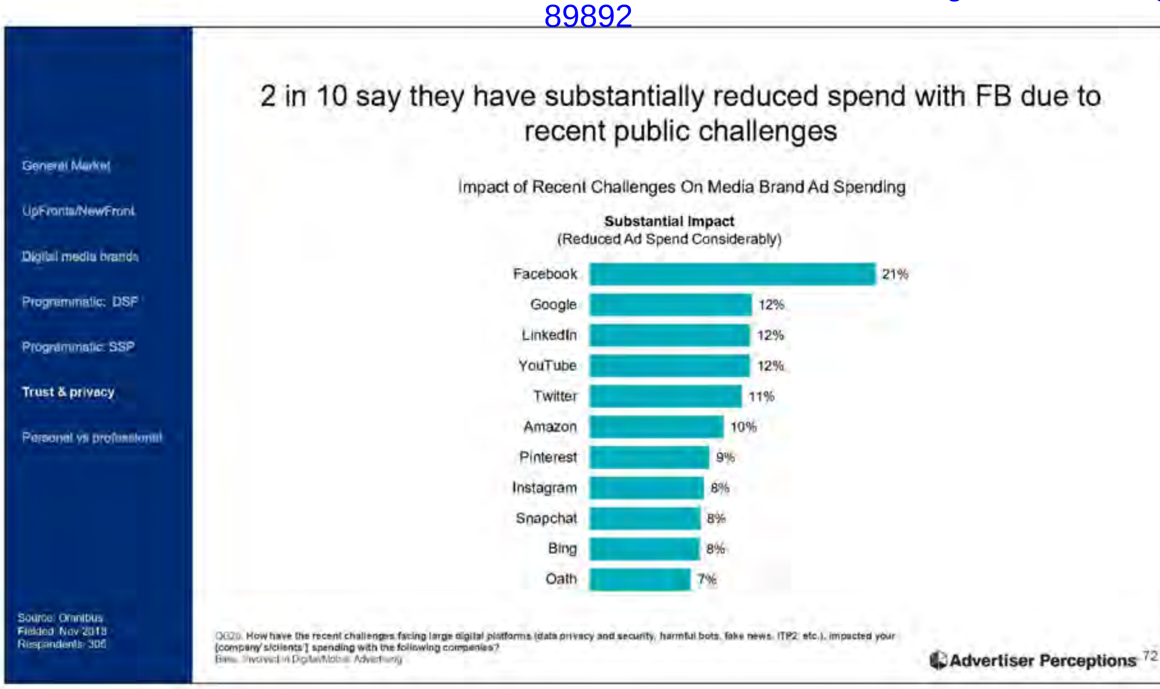
GOOGLE
QG1


Glass half empty view: few advertisers give any media brand highest rating in safeguarding user data; marketers even more reticent
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Trustworthiness of Media Company with Audience's Private Personal Data
Top Box (7/7 Highly Trustworthy)
Google 16% 22% 8%
LinkedIn 16% 21% 9%
YouTube 14% 20% 4%
Amazon 13% 18% 5%
Oath (incl. Yahoo/AOL properties) 13% 17% 7%
Bing 12% 16% 5%
Instagram 11% 15% 6%
Twitter 11% 16% 3%
Pinterest 10% 14% 4%
Facebook 10% 14% 3%
Snapchat 7% 11% 1%
Source: Omnibus
Fielded: Nov 2018
Respondents: 306
Advertiser Perceptions
70

GOOGLE
QG1


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Source: Omnibus
Fielded: Nov 2018
Respondents: 305
When framed in context of *concerns* over privacy, fake news, election meddling, advertisers express *most concern over FB*
Level of Concern with Negative Risks of Advertising with Media Brand
6,7 Ratings (Concerned)
3-5 ratings
1,2 Ratings (Not Concerned)
Facebook 52% 41% 7%
Twitter 33% 55% 12%
YouTube 31% 56% 13%
Snapchat 30% 58% 13%
Google 26% 53% 21%
Instagram 26% 61% 13%
Oath (incl. Yahoo/AOL properties) 24% 59% 17%
Amazon 23% 51% 26%
Pinterest 21% 55% 23%
LinkedIn 20% 52% 29%
Bing 19% 57% 24%
QG2a: Thinking about some of the recent challenges facing large digital platforms (data privacy and security, harmful bots, troll farms, fake news, election meddling, etc.), how **concerned** are you with the negative risks associated with advertising on the following platform/companies? (1 - Not at All Concerned, 7 - Highly Concerned)
Base: Involved in Digital/Mobile Advertising
Advertiser Perceptions
71

GOOGLE
QG2a


General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
2 in 10 say they have substantially reduced spend with FB due to recent public challenges
Impact of Recent Challenges On Media Brand Ad Spending
Substantial Impact
(Reduced Ad Spend Considerably)
Facebook 21%
Google 12%
LinkedIn 12%
YouTube 12%
Twitter 11%
Amazon 10%
Pinterest 9%
Instagram 8%
Snapchat 8%
Bing 8%
Oath 7%
Source: Omnibus
Fielded: Nov 2018
Respondents: 306
QG2b. How have the recent challenges facing large digital platforms (data privacy and security, harmful bots, fake news, ITP2, etc.), impacted your [company's/clients'] spending with the following companies?
Base: Involved in Digital/Mobile Advertising
Advertiser Perceptions
72

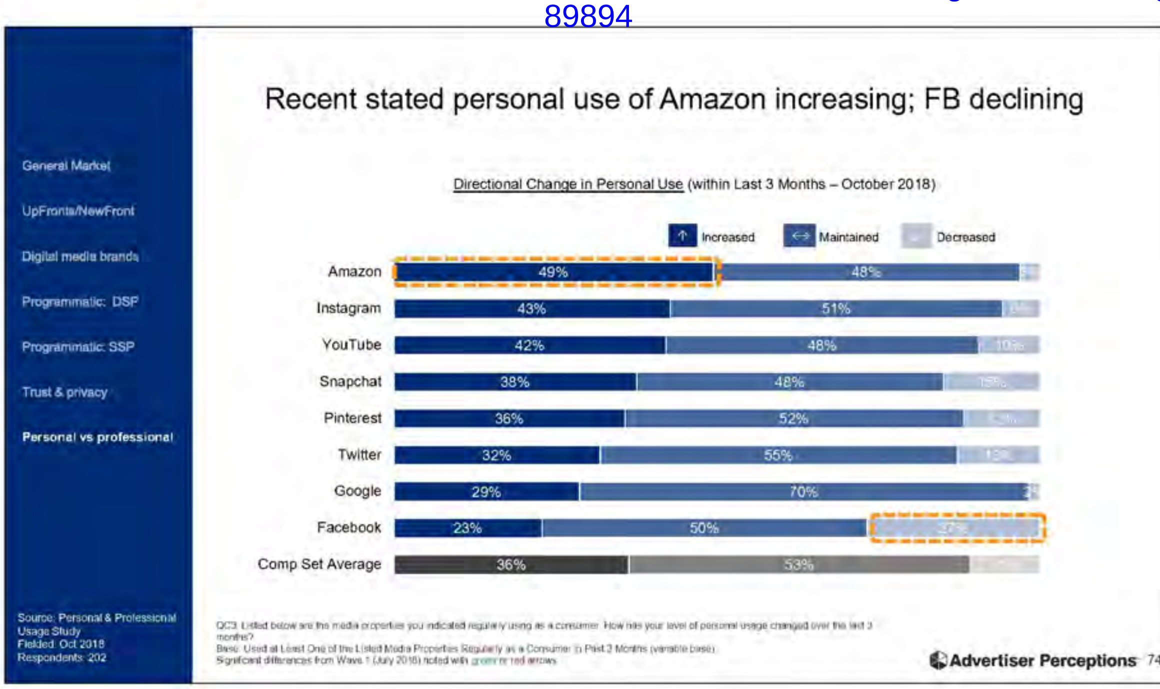
GOOGLE
QG2b

- General Market
- UpFronts/NewFront
- Digital media brands
- Programmatic: DSP
- Programmatic: SSP
- Trust & privacy
- **Personal vs professional**

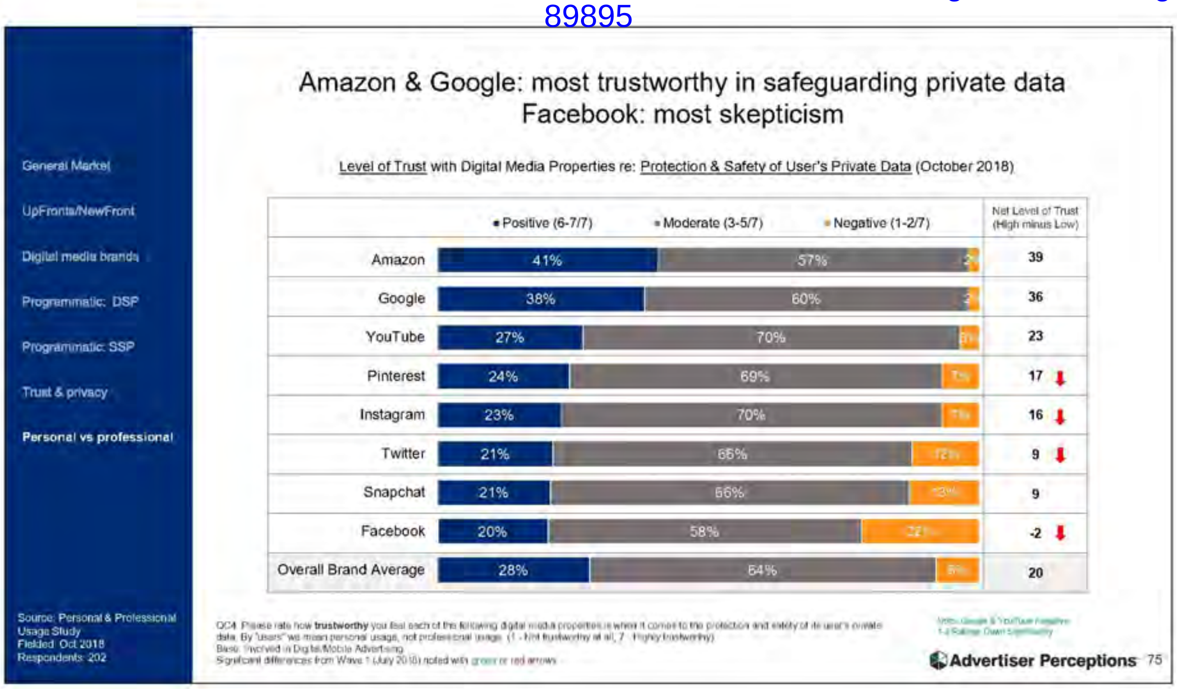
Personal vs professional advertiser perspectives of leading digital brands

- Advertiser continue to say they are personally using Facebook less
  - And Instagram continues to gain favor
- FB declines in personal usage more clearly centered now on the data privacy
- Correlation with spending?
  - Advertiser are most bullish on Amazon, YouTube & Instagram
  - Less so on FB

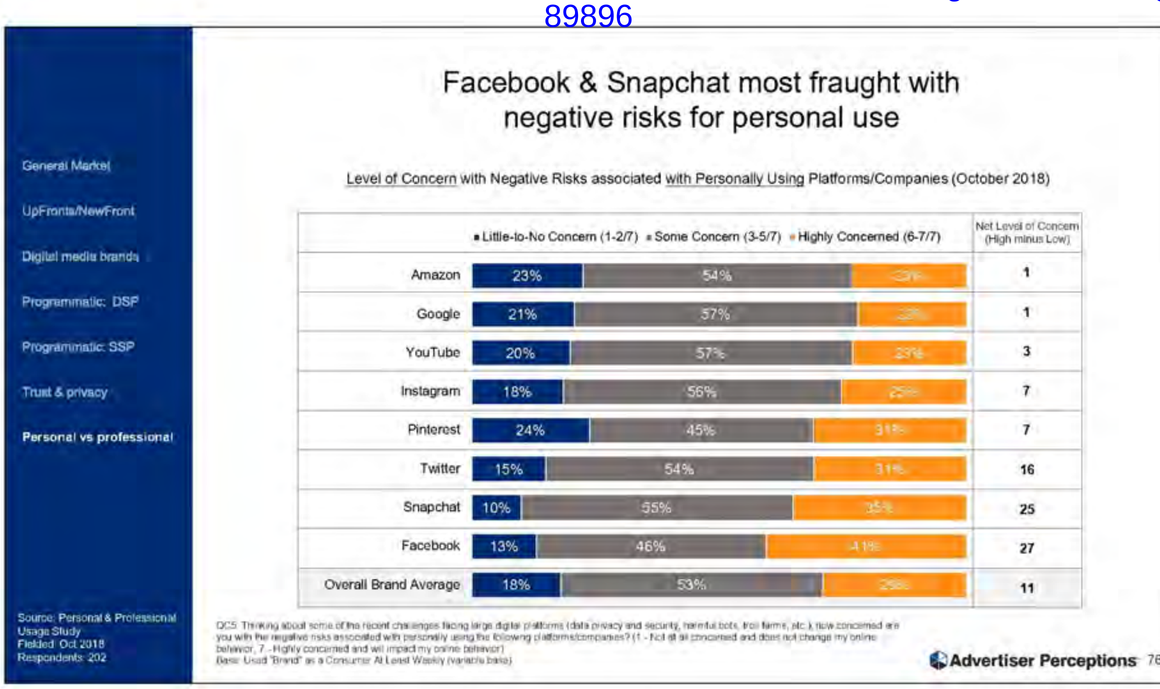
Advertiser Perceptions



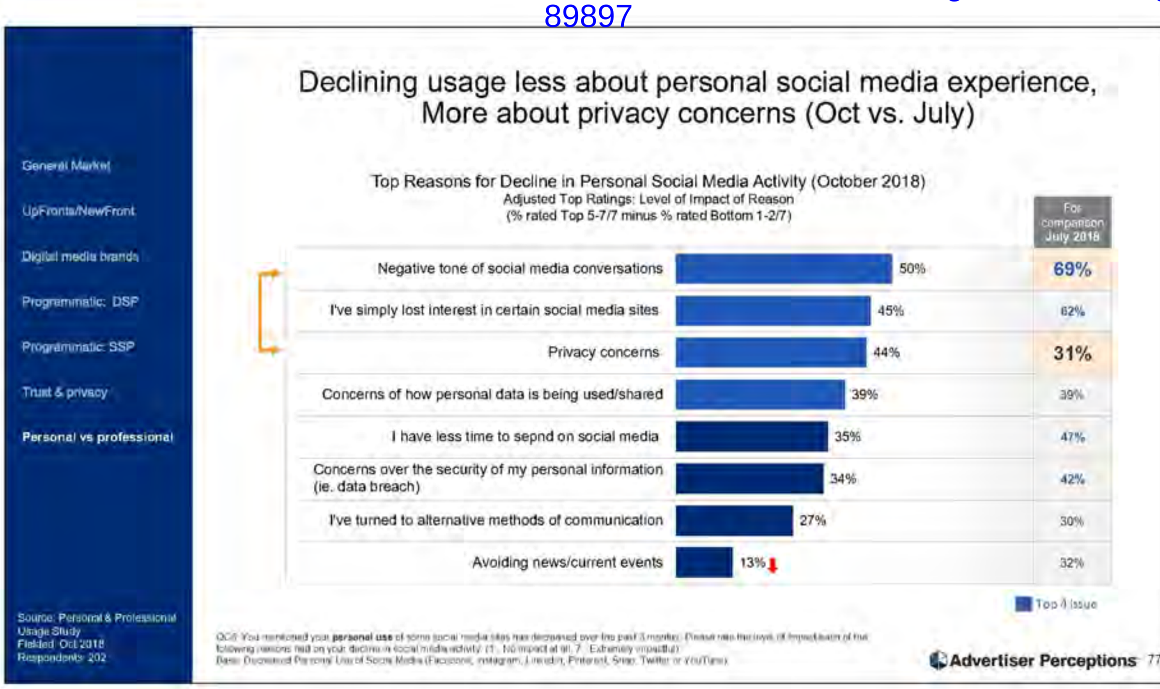
DATA PRIVACY: PERSONAL VS. PROFESSIONAL
QC3



DATA PRIVACY: PERSONAL VS. PROFESSIONAL
QC4

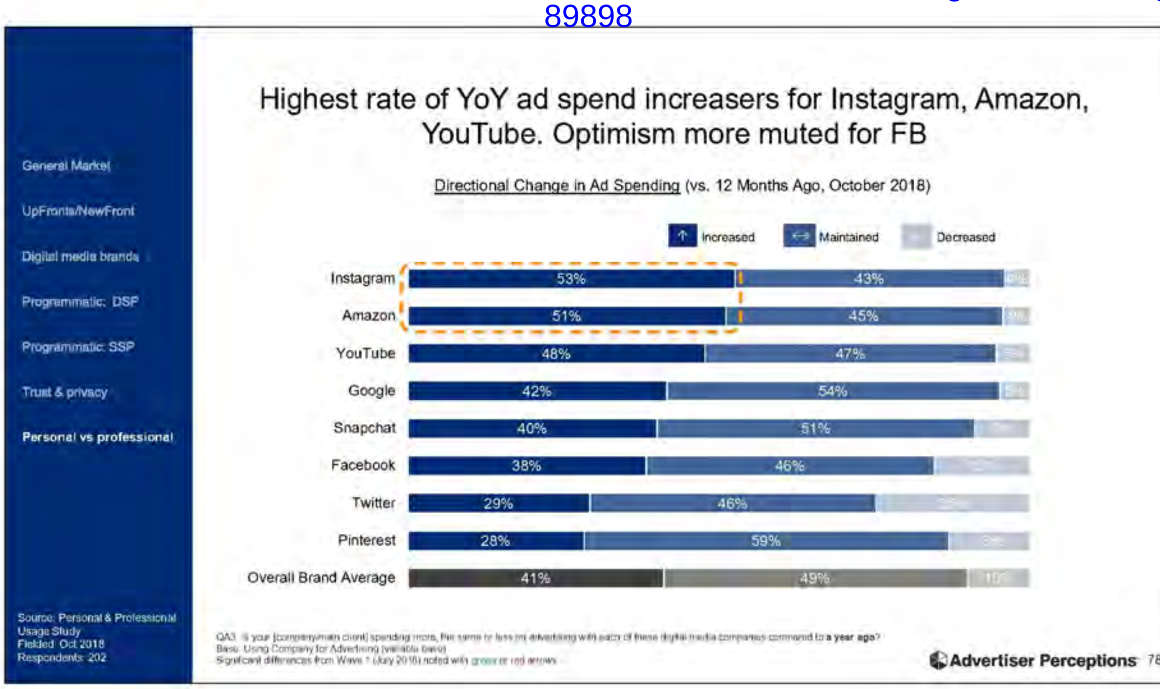


DATA PRIVACY: PERSONAL VS. PROFESSIONAL
QC5



Declining usage less about personal social media experience, More about privacy concerns (Oct vs. July)
General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional
Top Reasons for Decline in Personal Social Media Activity (October 2018)
Adjusted Top Ratings: Level of Impact of Reason
(% rated Top 5-7/7 minus % rated Bottom 1-2/7)
For comparison July 2018
Negative tone of social media conversations 50% 69%
I've simply lost interest in certain social media sites 45% 62%
Privacy concerns 44% 31%
Concerns of how personal data is being used/shared 39% 39%
I have less time to sepnd on social media 35% 47%
Concerns over the security of my personal information (ie. data breach) 34% 42%
I've turned to alternative methods of communication 27% 30%
Avoiding news/current events 13% 32%
Top 4 issue
Source: Personal & Professional Usage Study
Fielded: Oct 2018
Respondents: 202
Advertiser Perceptions 77

GOOGLE
QG1



INTERNAL – DATA PRIVACY: PERSONAL VS. PROFESSIONAL
QA3

General Market
UpFronts/NewFront
Digital media brands
Programmatic: DSP
Programmatic: SSP
Trust & privacy
Personal vs professional

*Note: Facebook-specific data is directional-only due to low base size of those answering; equivalent to a focus group

Source: Personal & Professional Usage Study
Fielded: Oct 2018
Respondents: 202

Are advertisers spending less with FB citing privacy and data as reasons? Yes

Ranked among Top 3 Reasons for Decline in Ad Spend (October 2018)
(Top 3 Weighted Rank %)

	facebook Only*	All Other brands (not incl. FB)
Concern about brand safety (content environment)	41%	30%
Concern over ethical handling of user data	39%	15%
Concern about my target audiences leaving the platform	31%	38%
Concern about secure handling of 1st party targeting data	31%	24%
Recent campaign performance did not meet expectations	21%	47%
Concern over the media company's reputation (associating [my/my client's] brand with the media company)	16%	21%

QR1. Which of the following are reasons for your [company/main client] decreasing ad spend with? Please rank up to 3 of your top reasons by clicking on your main reason first, and then up to two others in order of how much each influenced the decrease in ad spend. Base: Spending Less on Advertising With Media Companies Compared to a Year Ago (variable base).

Advertiser Perceptions 79

INTERNAL – DATA PRIVACY: PERSONAL VS. PROFESSIONAL
QR1

Key Takeaways

Advertiser Perspective on Digital Media Brands

- FB is less solid, Instagram is a safe harbor: Post-CA impact?
- Amazon: Gaining as Must Buy . . .
- . . .and appear to be taking dollars allocated to Google Ads

Amazon snapshot: search, display, programmatic

- Overall: Amazon continues to gain ground vs. Google in key selection driver ratings
- Search: Our first view of Amazon advertisers on impact to search spending
  - The "Amazon Effect" seems real and a direct hit on search allocation
  - . . . And disproportionately adversely impacting Google Ads
- Programmatic: Amazon Advertising DSP gaining at senior marketer levels

Programmatic demand-side perspective

- DBM still leading in all the key tech categories, but Amazon mind share remains as strong as Google's
- The rise of The Trade Desk, especially with marketers, where they had been purposefully playing in the background. That has changed.

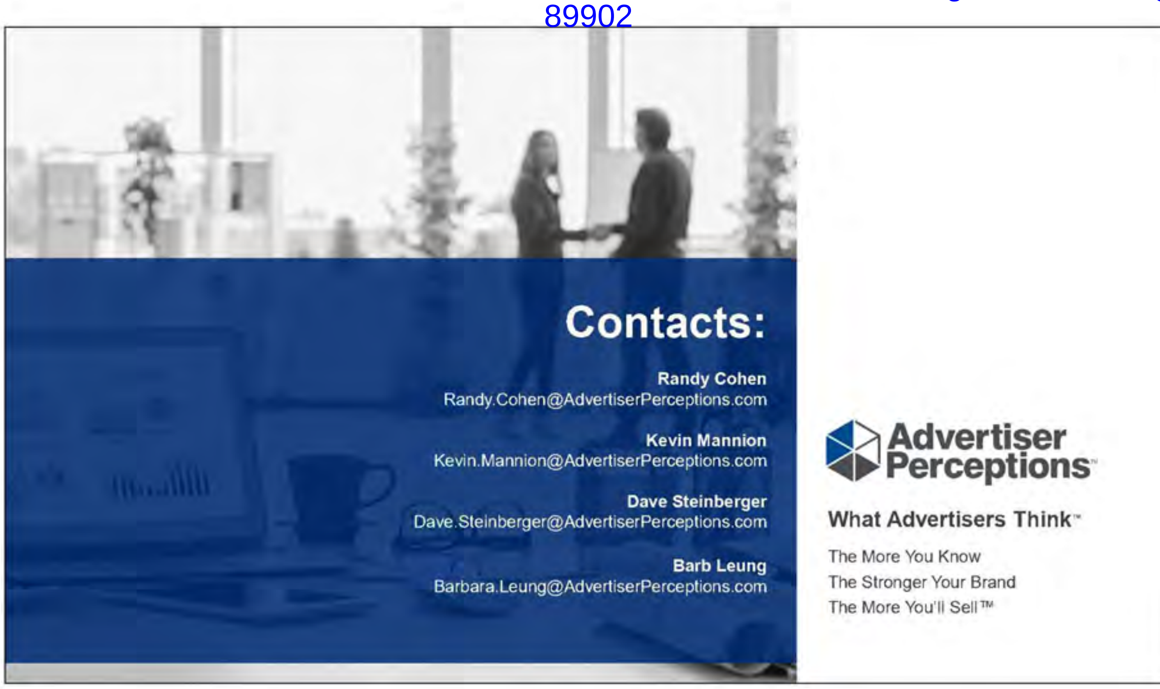
Key Takeaways

Publisher perspectives on SSPs

- Google dominates in funnel metrics, but red flags in selection driver perceptions
- A return to competitiveness for two of the original 3 SSPs
  - Pubmatic, Rubicon
- Opportunity for many to vie for 2nd

Advertiser Perspectives of Trust & Privacy

- Overwhelming majority believe data privacy is a strategic business concern
  - Expect changes in data usage policies, transparency with consumers, & shifting from 3rd to 1st party data reliance
- Google fares better than other brands, especially FB, in protecting user data
  - But no media brand viewed as exceptionally trustworthy in this regard


Contacts:
Randy Cohen
Randy.Cohen@AdvertiserPerceptions.com
Kevin Mannion
Kevin.Mannion@AdvertiserPerceptions.com
Dave Steinberger
Dave.Steinberger@AdvertiserPerceptions.com
Barb Leung
Barbara.Leung@AdvertiserPerceptions.com
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The More You'll Sell™